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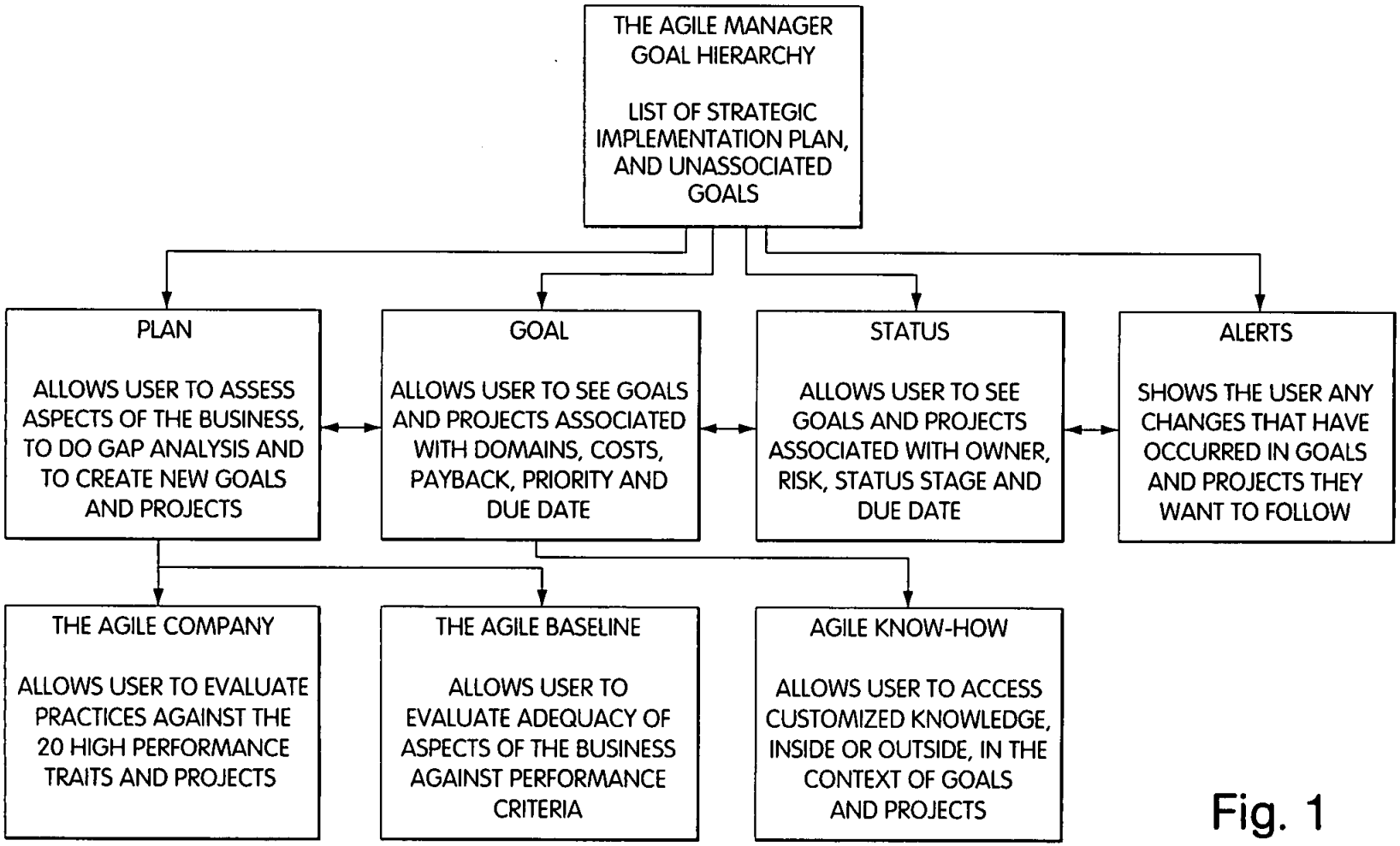

Fig. 1

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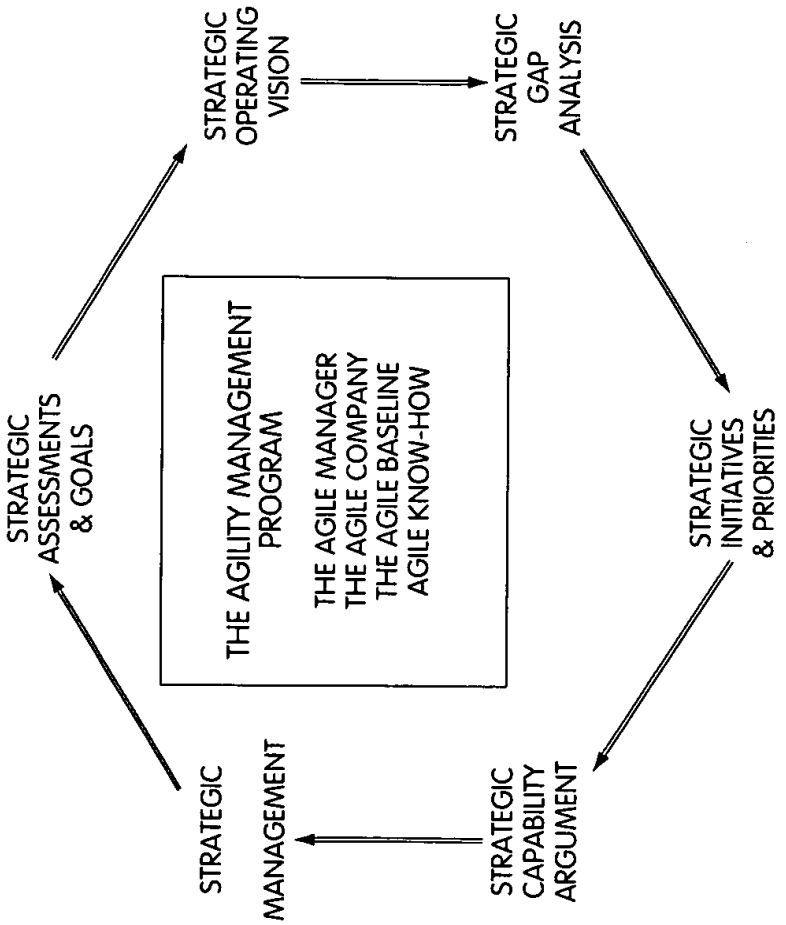

Fig. 2

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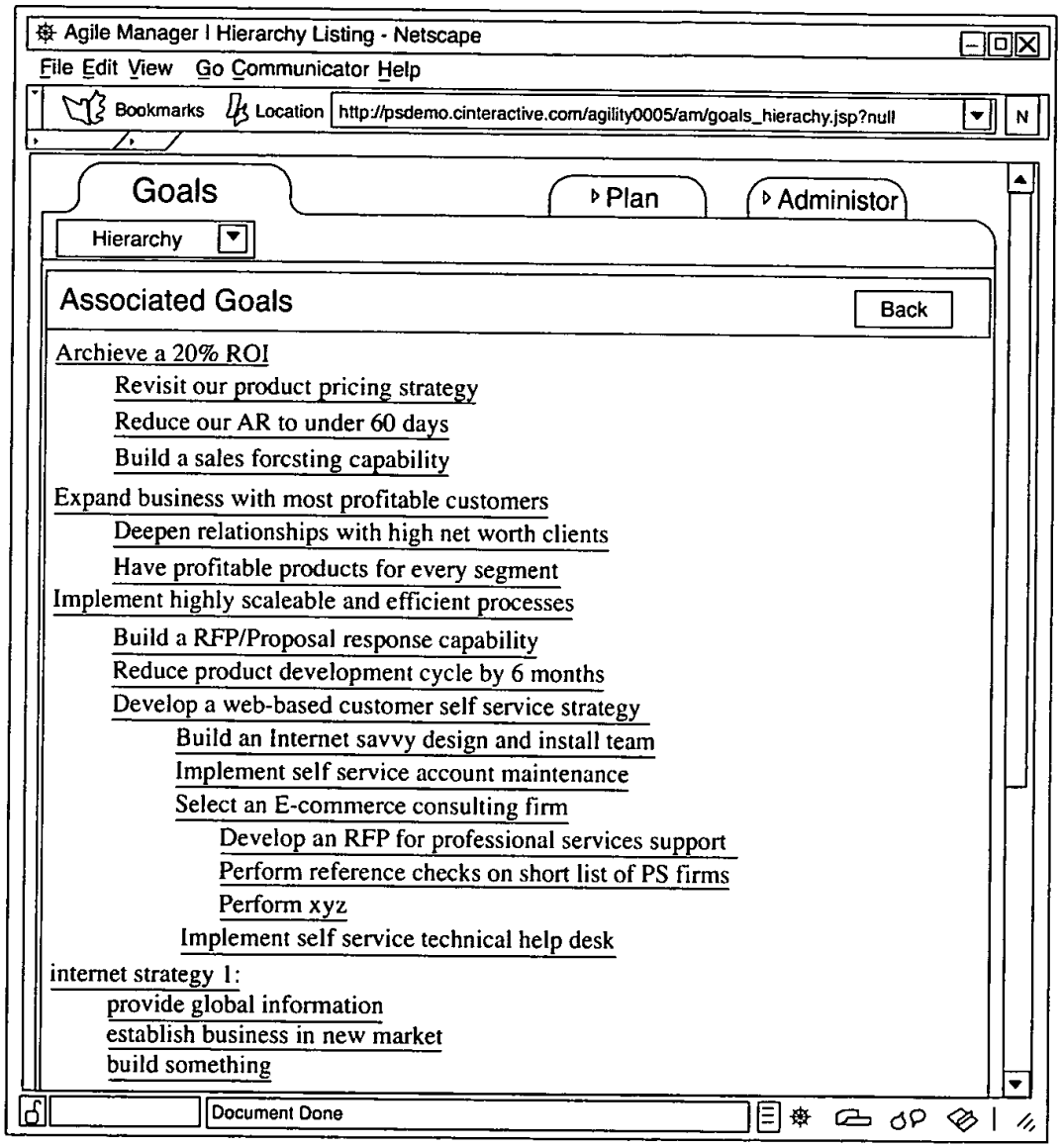

Fig. 3

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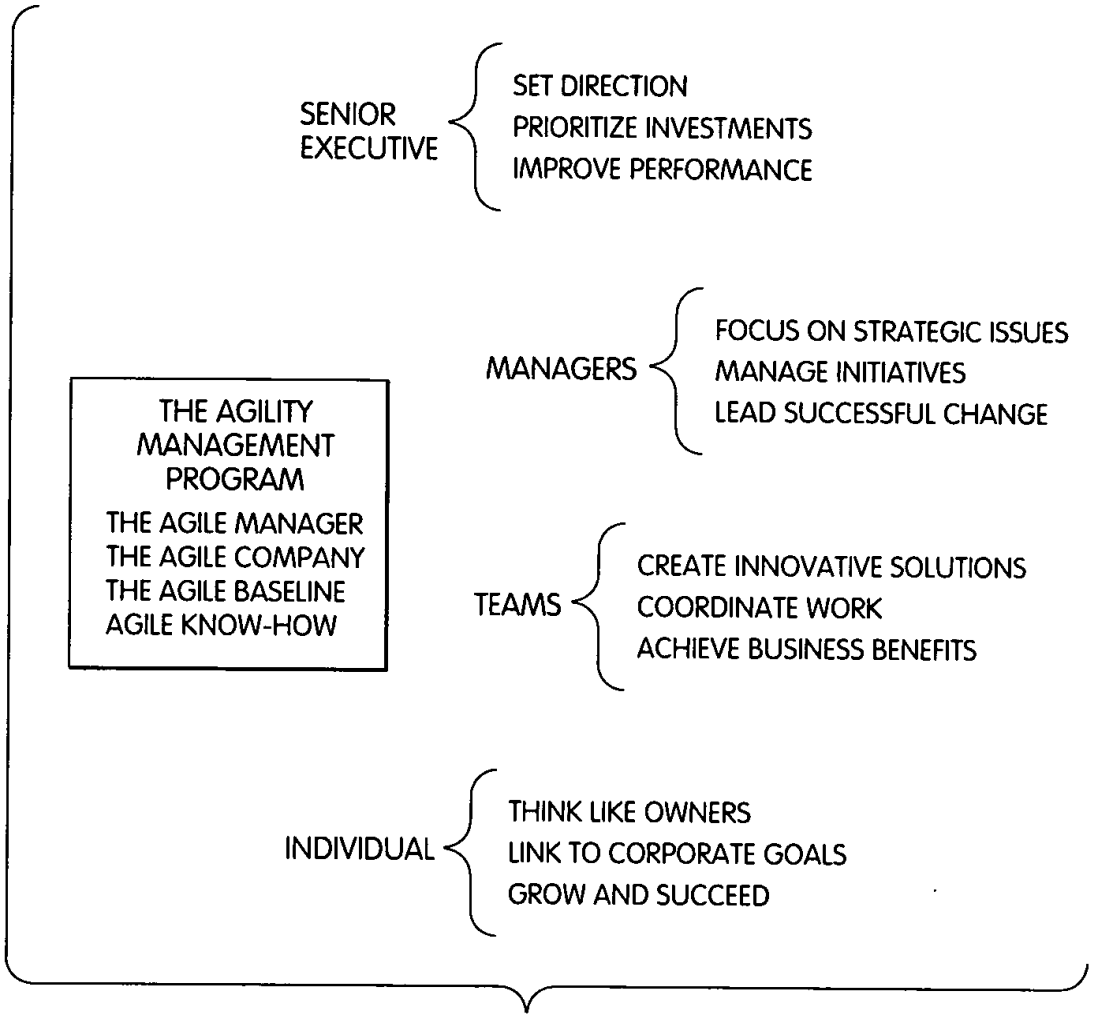

Fig. 4

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RESEARCH BASED DIAGNOSTICS REDUCE
ORGANIZATIONAL BARRIERS

ENTERPRISE

- "HARD-WIRED" TO CUSTOMER NEEDS/BEHAVIORS
- INFECTIOUS, IMPROVEMENT-DRIVEN LEADERSHIP
- VISIONARY LEADERSHIP WITH CRYSTAL CLEAR COMMUNICATION
- EMPLOYEES ACT LIKE/TREATED LIKE OWNERS
- ACTION FOCUSED INNOVATION/RISK TAKING REWARDED
- VALUE BASED DECISION MAKING AT LOWEST LEVEL
- ADAPTIVE CULTURE, REVOLUTIONARY WHEN NECESSARY
- DRIVEN TO EXCEL; "GOOD ENOUGH NEVER IS"
- RELENTLESS COMMITMENT TO LOWER COST AND HIGHER QUALITY
- BOUNDARYLESS, BY WELL MANAGED STRUCTURES
- TIME/RESOURCES FOCUS ON HIGH VALUE INITIATIVES
- SYSTEMATIC, OPPORTUNISTIC STRATEGIES THAT ADAPT
- CONCENTRATE WHERE THE BUSINESS LEVERAGE IS
- EXACTING EXECUTION WITH RELIABLE RESULTS
- INFORMATION/KNOWLEDGE ACCESSIBLE AS NEEDED

MANAGEMENT TEAM

- FOCUSING ON THE HIGHEST GAIN STRATEGIC INITIATIVES:
  - CREATING A PORTFOLIO OF HIGH LEVERAGE INITIATIVES
  - REPRIORITIZING THE PORTFOLIO AS THINGS CHANGE
  - REVIEWING NEW/OLD INITIATIVES FOR ROI IMPACT
- REDUCING ORGANIZATIONAL BARRIERS TO SUCCESS:
  - DETERMINING FACTORS CRITICAL FOR SUCCESS
  - IDENTIFYING KEY RISKS TO BE MANAGED PROACTIVELY
  - MAKING ADJUSTMENTS TO ELIMINATE KEY BARRIERS
- APPLYING MANAGEMENT TALENT ON THE RIGHT THINGS:
  - REINFORCING STRATEGIC GOALS USING STRUCTURED COMMUNICATION
  - GETTING SUBSTANCE FROM MANAGEMENT MEETINGS
  - FOCUSING MANAGEMENT ATTENTION ON THE HIGH LEVERAGE ITEMS
- EQUIPPING LEADERS TO SUCCEED:
  - LEARNING TO THINK LIKE OWNERS
  - GETTING THE MOST FROM INTERDISCIPLINARY TEAMS
  - MANAGING PROJECT RISK TO VALUE

Fig. 5

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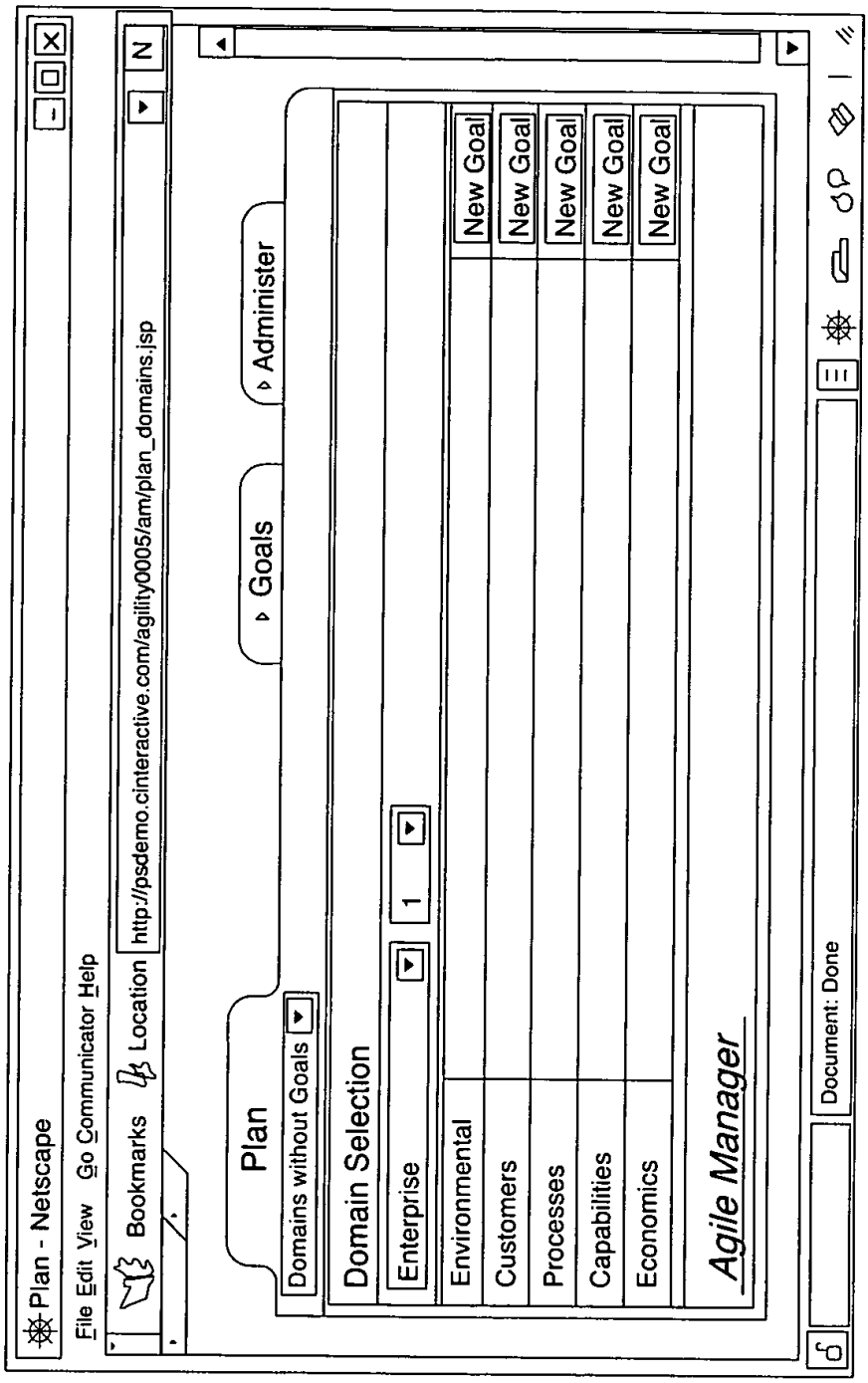

Fig. 6

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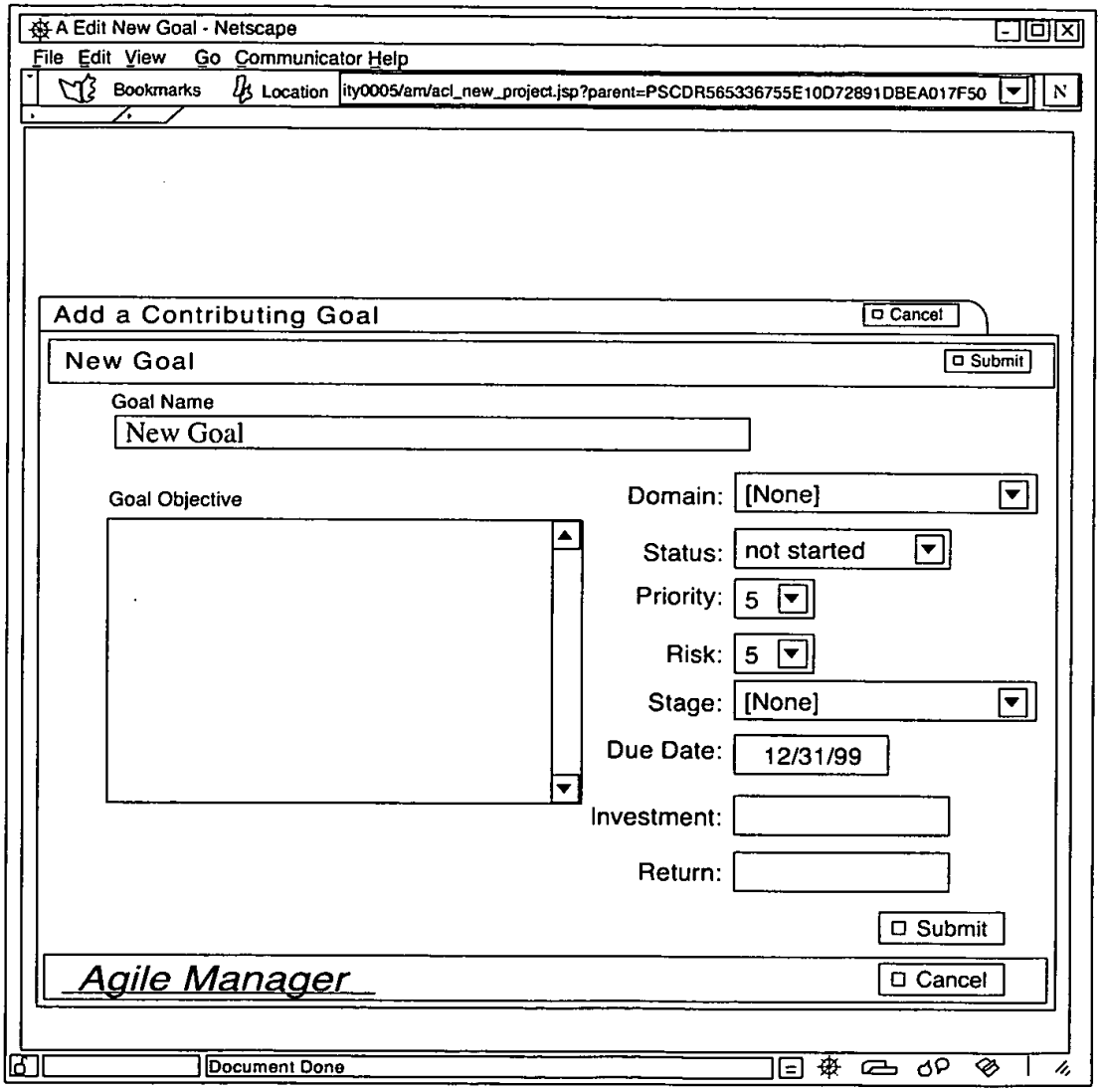

Fig. 7

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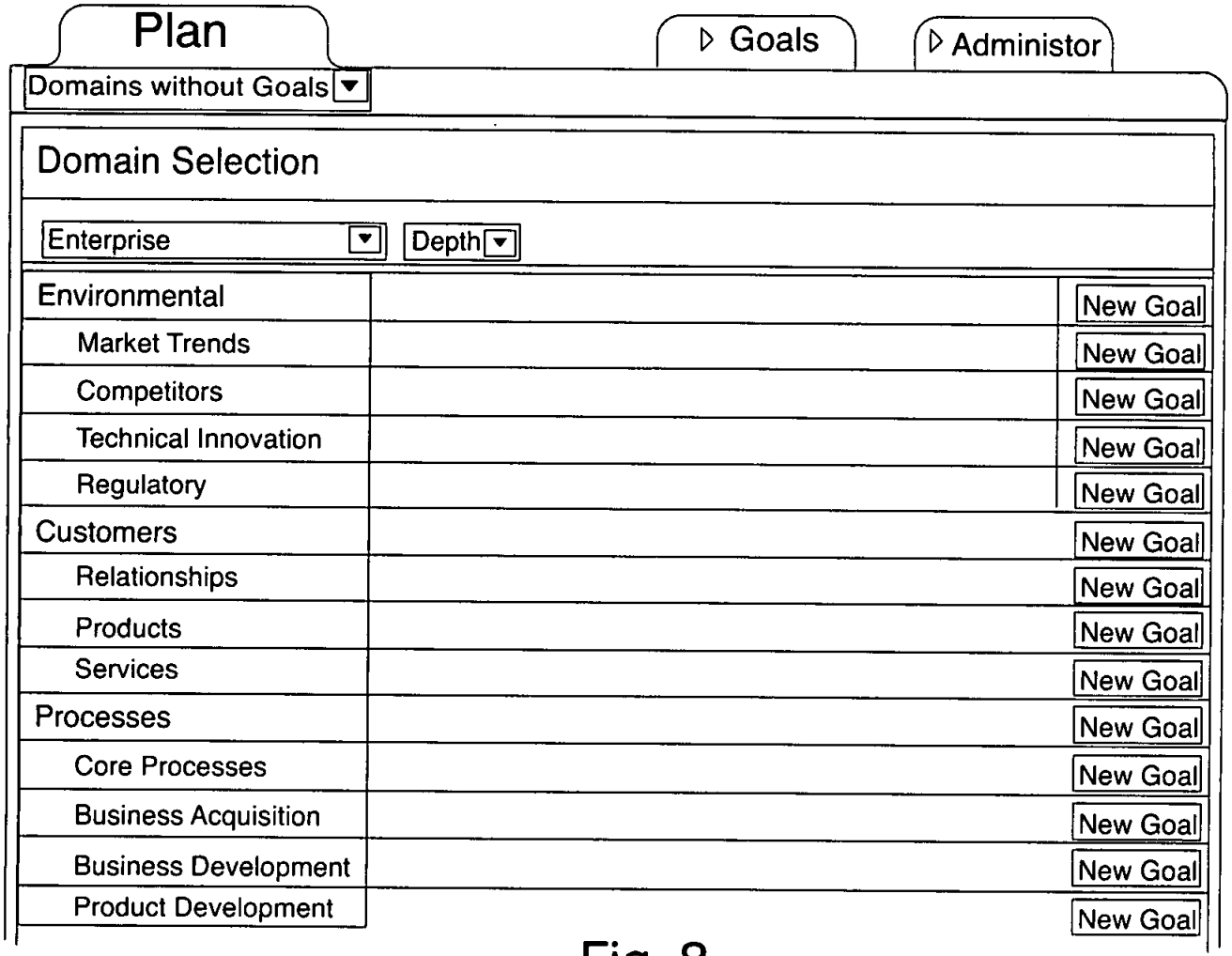

Fig. 8

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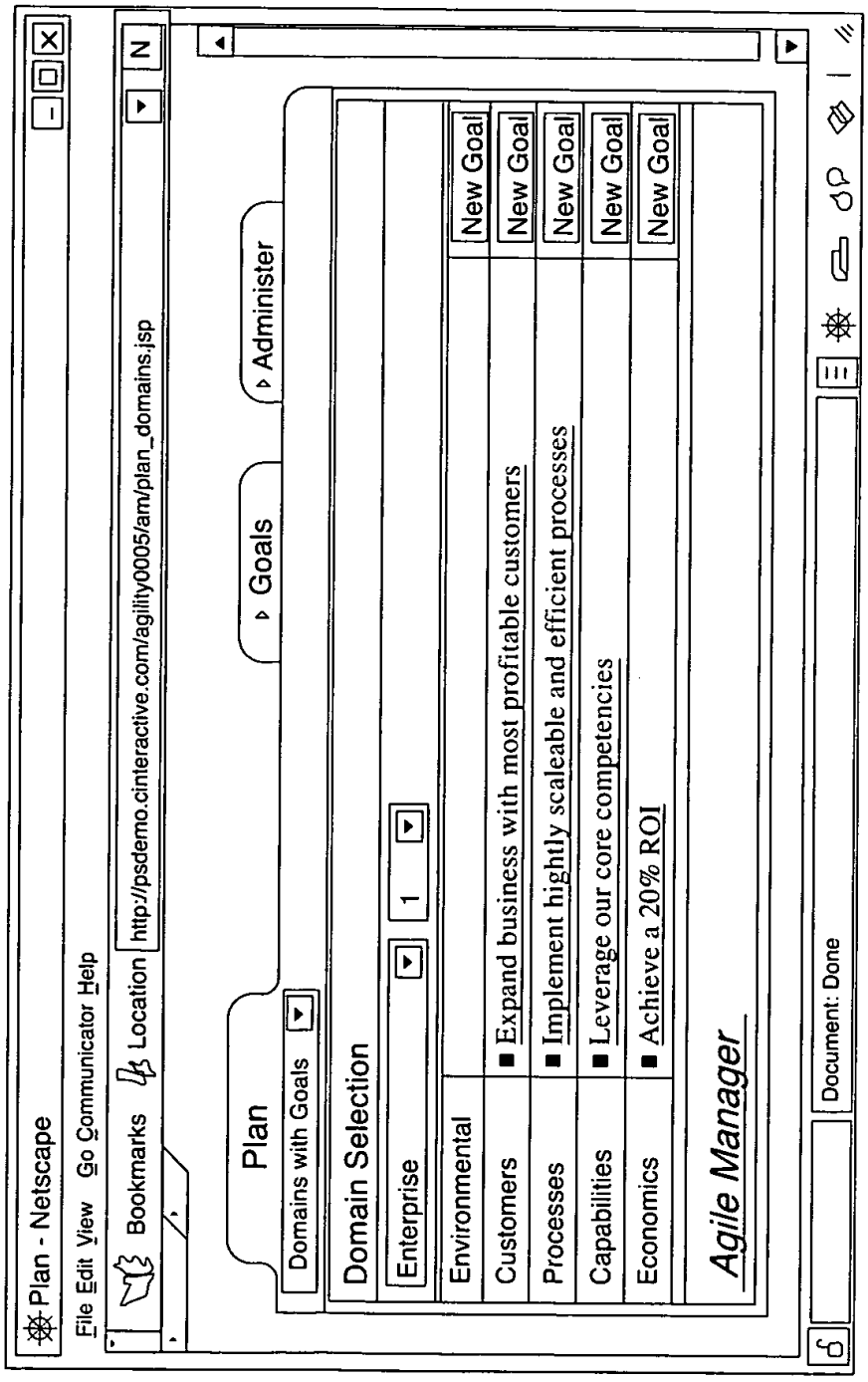

Fig. 9

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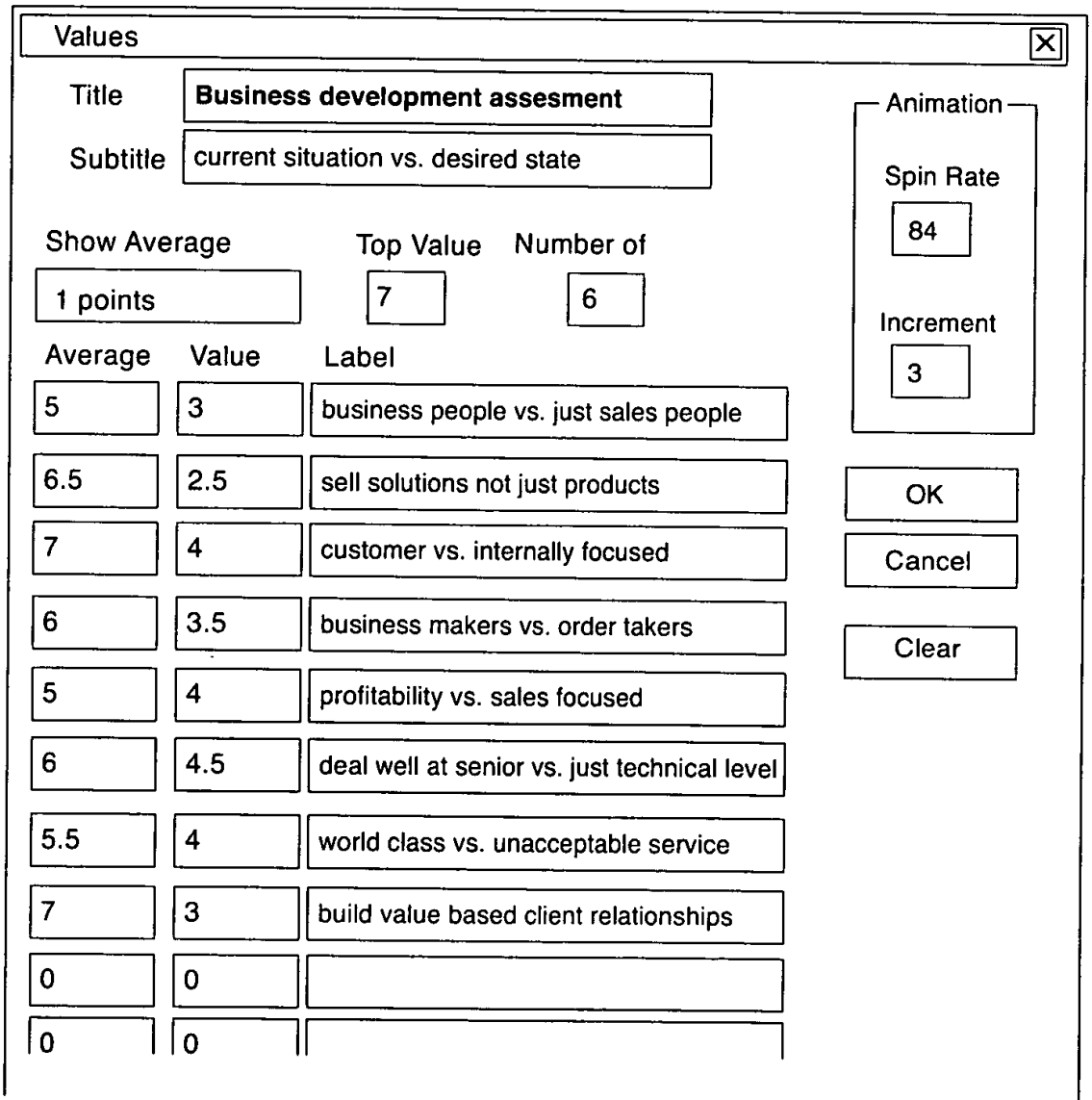

Fig. 10

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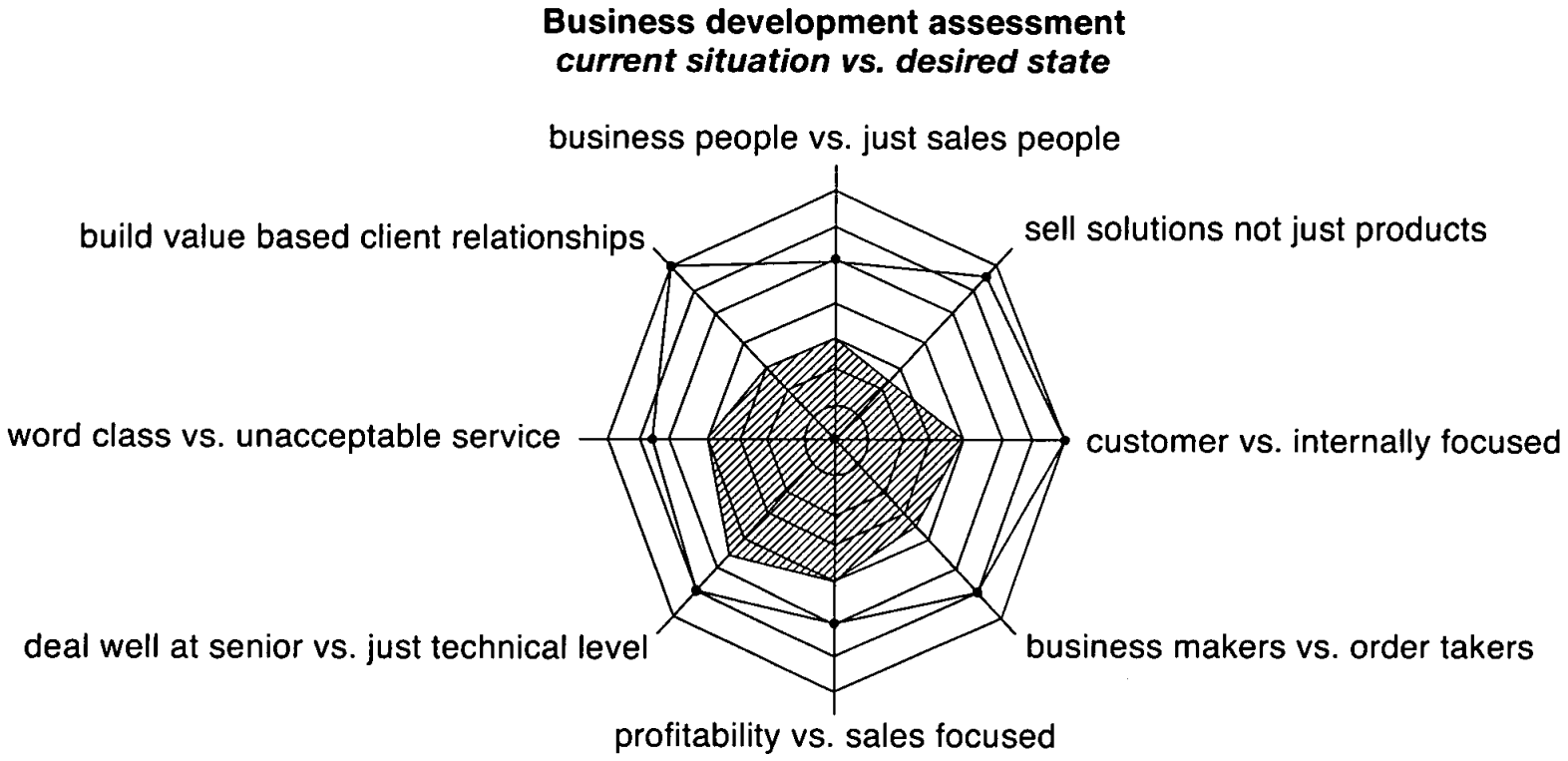

Fig. 11

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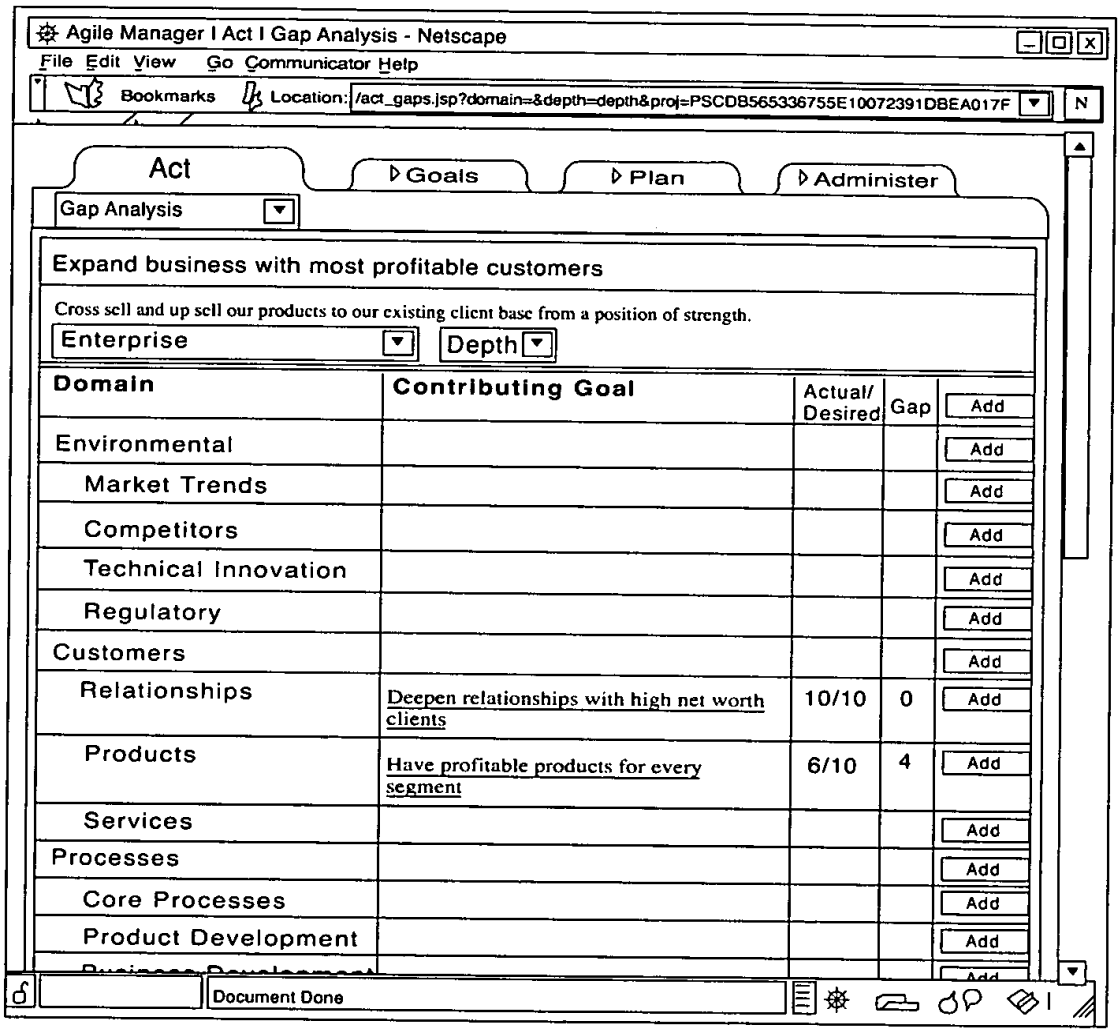

Fig. 12

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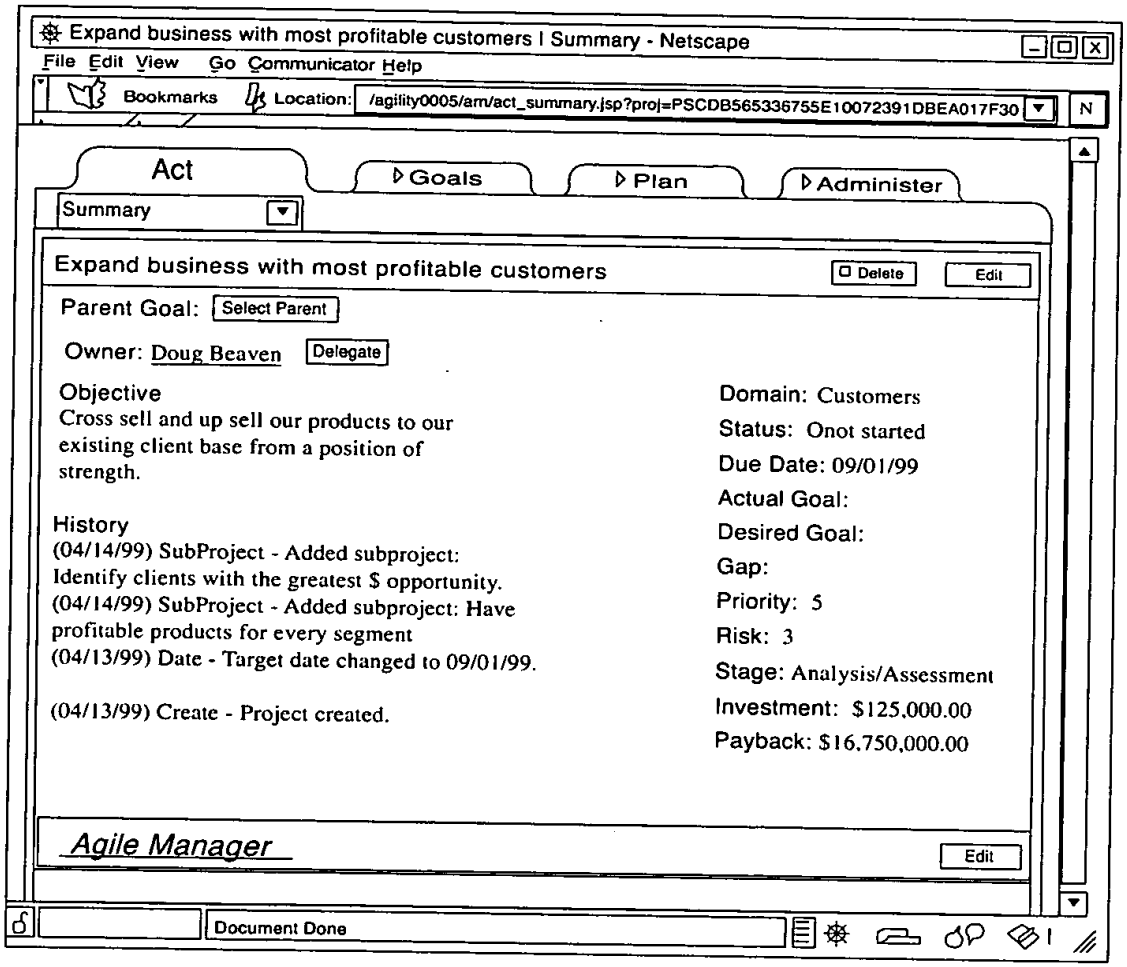

Fig. 13

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JC159

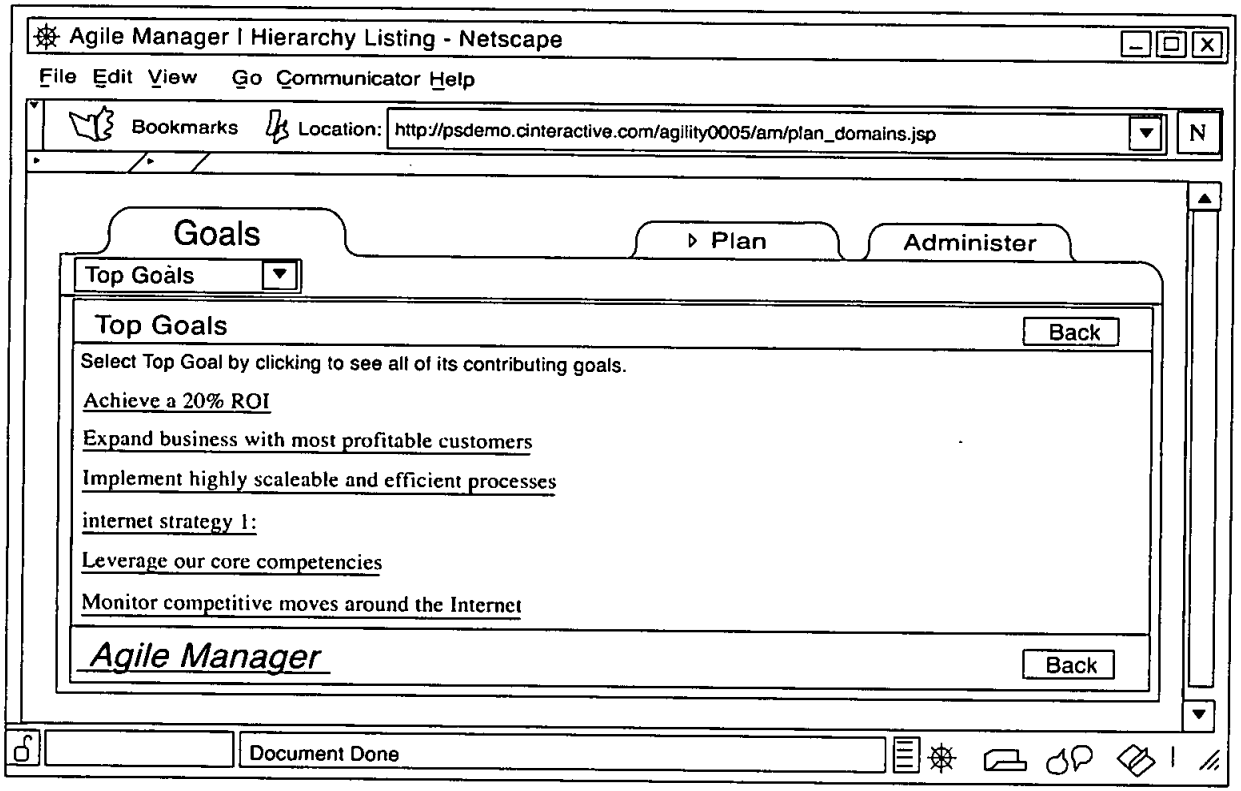

Fig. 14

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PATENT & TRADEMARK OFFICE

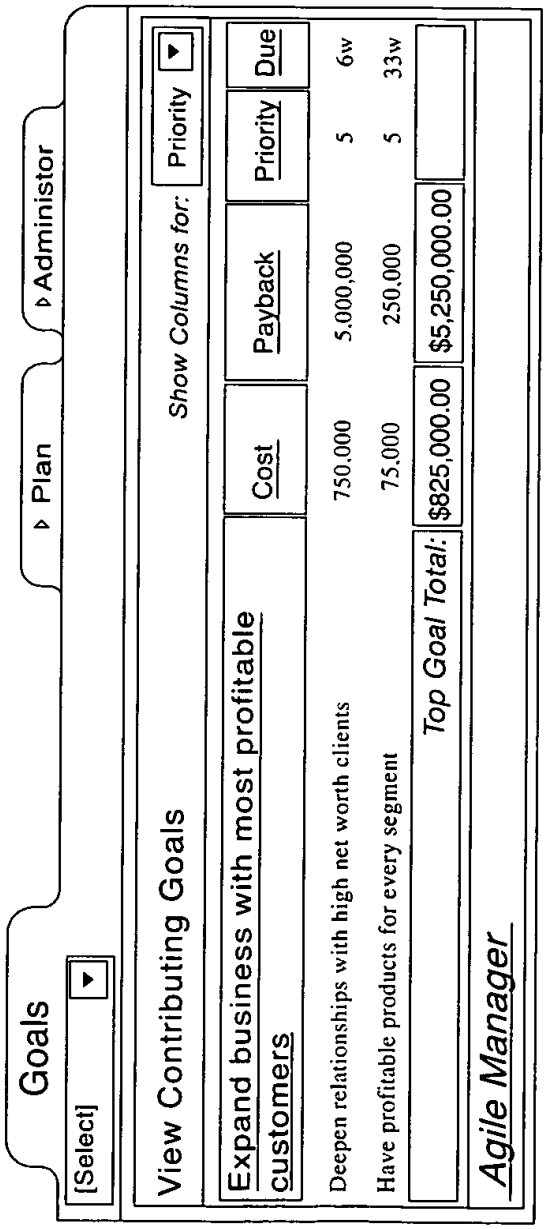
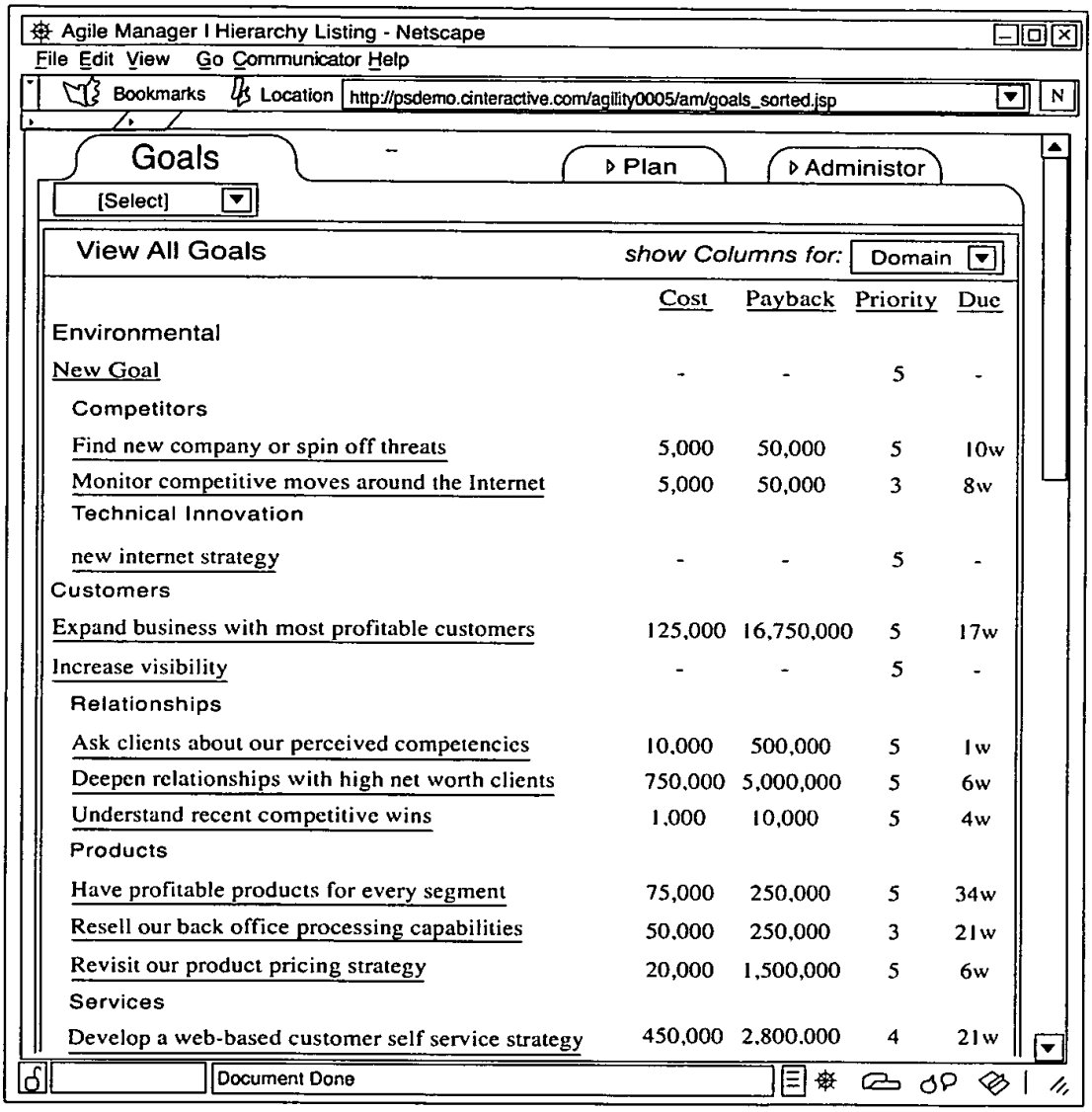


Fig. 15

OIPE JC109 MAY 05 2003 PATENT & TRADEMARK OFFICE



	Cost	Payback	Priority	Due
Environmental				
New Goal	-	-	5	-
Competitors				
Find new company or spin off threats	5,000	50,000	5	10w
Monitor competitive moves around the Internet	5,000	50,000	3	8w
Technical Innovation				
new internet strategy	-	-	5	-
Customers				
Expand business with most profitable customers	125,000	16,750,000	5	17w
Increase visibility	-	-	5	-
Relationships				
Ask clients about our perceived competencies	10,000	500,000	5	1w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Understand recent competitive wins	1,000	10,000	5	4w
Products				
Have profitable products for every segment	75,000	250,000	5	34w
Resell our back office processing capabilities	50,000	250,000	3	21w
Revisit our product pricing strategy	20,000	1,500,000	5	6w
Services				
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w

Fig. 16

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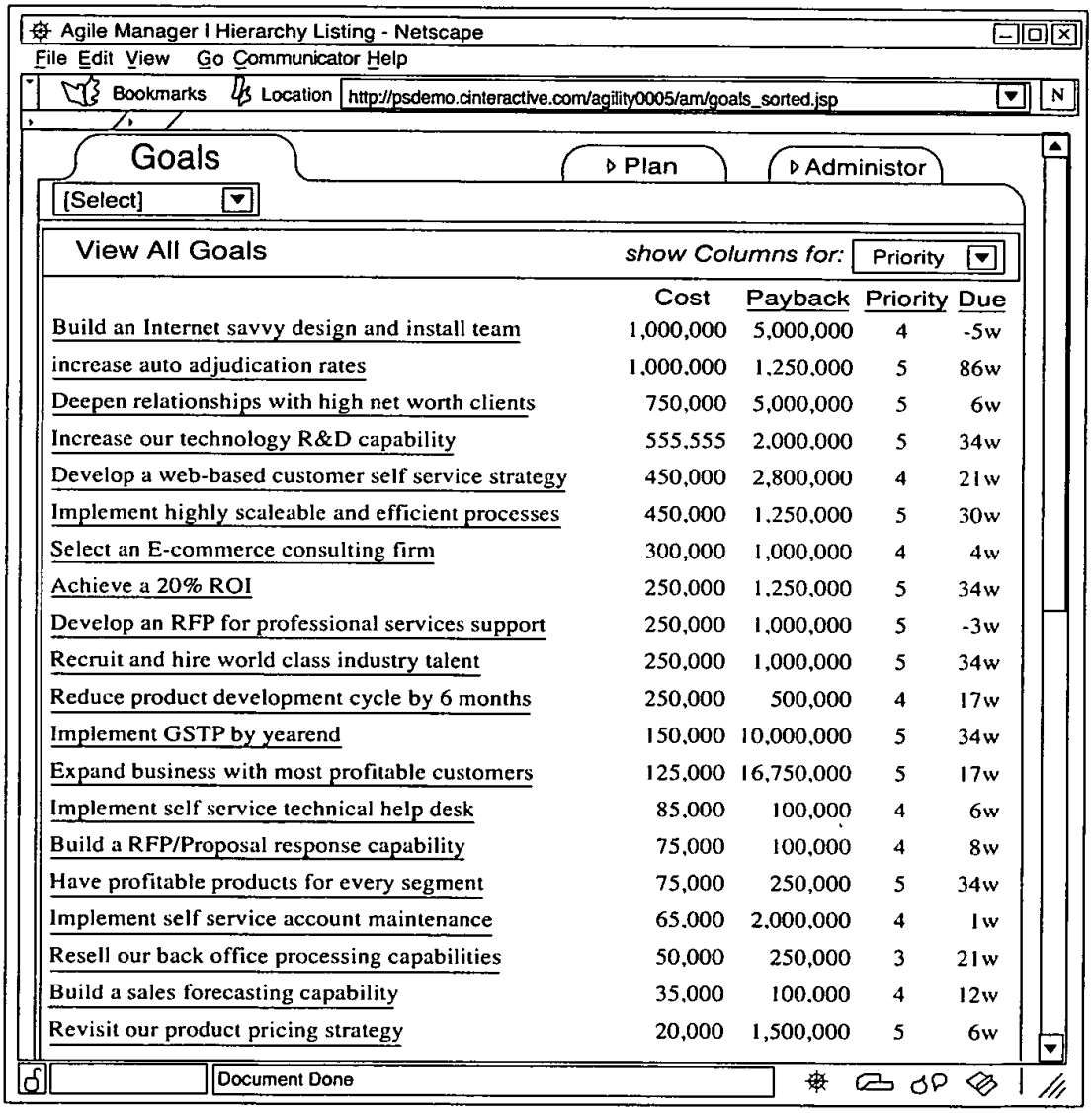

	Cost	Payback	Priority	Due
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
increase auto adjudication rates	1,000,000	1,250,000	5	86w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Implement highly scaleable and efficient processes	450,000	1,250,000	5	30w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Develop an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Implement GSTP by yearend	150,000	10,000,000	5	34w
Expand business with most profitable customers	125,000	16,750,000	5	17w
Implement self service technical help desk	85,000	100,000	4	6w
Build a RFP/Proposal response capability	75,000	100,000	4	8w
Have profitable products for every segment	75,000	250,000	5	34w
Implement self service account maintenance	65,000	2,000,000	4	1w
Resell our back office processing capabilities	50,000	250,000	3	21w
Build a sales forecasting capability	35,000	100,000	4	12w
Revisit our product pricing strategy	20,000	1,500,000	5	6w

Fig. 17

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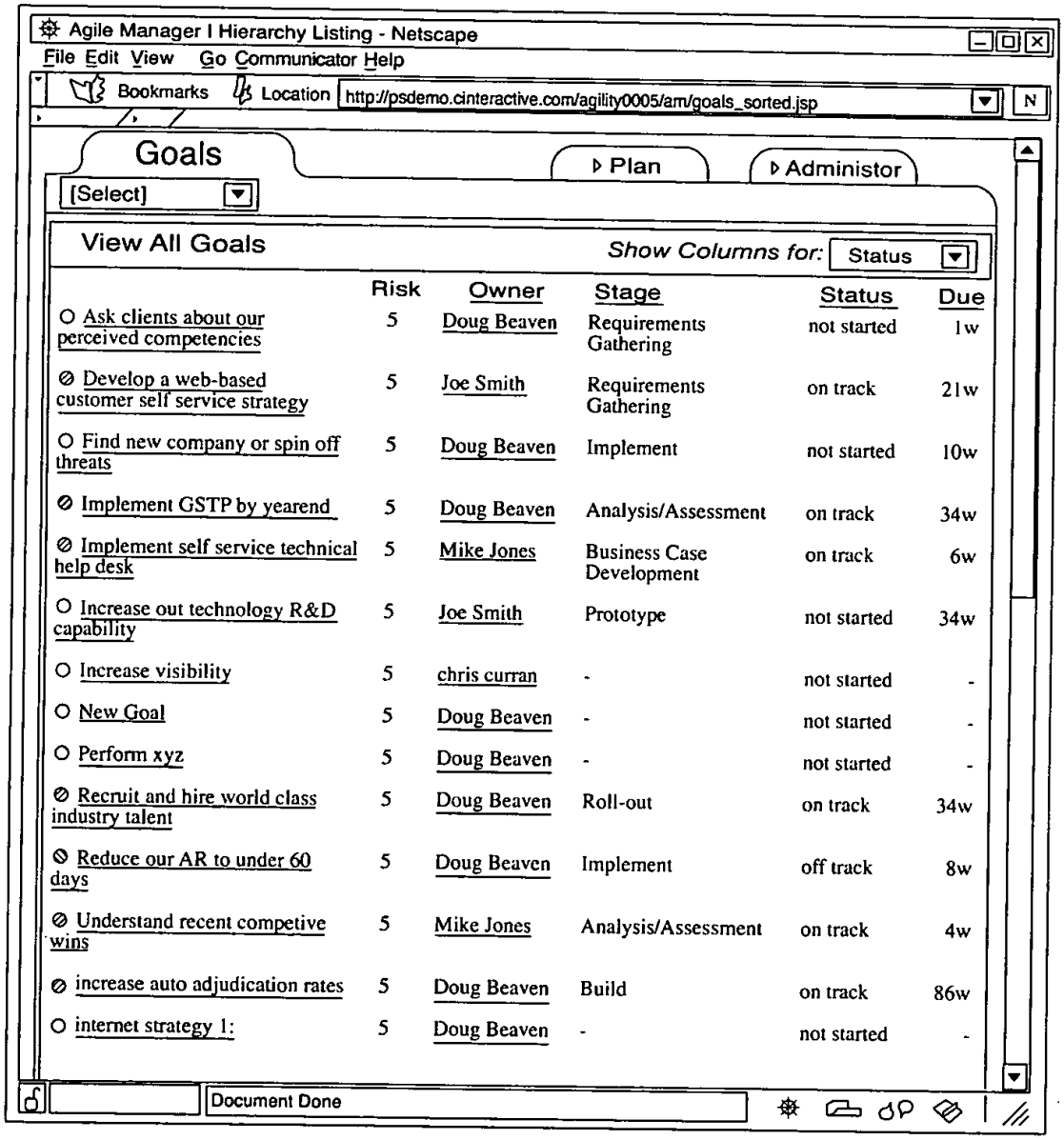

	Risk	Owner	Stage	Status	Due
Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1w
Develop a web-based customer self service strategy	5	Joe Smith	Requirements Gathering	on track	21w
Find new company or spin off threats	5	Doug Beaven	Implement	not started	10w
Implement GSTP by yearend	5	Doug Beaven	Analysis/Assessment	on track	34w
Implement self service technical help desk	5	Mike Jones	Business Case Development	on track	6w
Increase out technology R&D capability	5	Joe Smith	Prototype	not started	34w
Increase visibility	5	chris curran	-	not started	-
New Goal	5	Doug Beaven	-	not started	-
Perform xyz	5	Doug Beaven	-	not started	-
Recruit and hire world class industry talent	5	Doug Beaven	Roll-out	on track	34w
Reduce our AR to under 60 days	5	Doug Beaven	Implement	off track	8w
Understand recent competive wins	5	Mike Jones	Analysis/Assessment	on track	4w
increase auto adjudication rates	5	Doug Beaven	Build	on track	86w
internet strategy 1:	5	Doug Beaven	-	not started	-

Fig. 18

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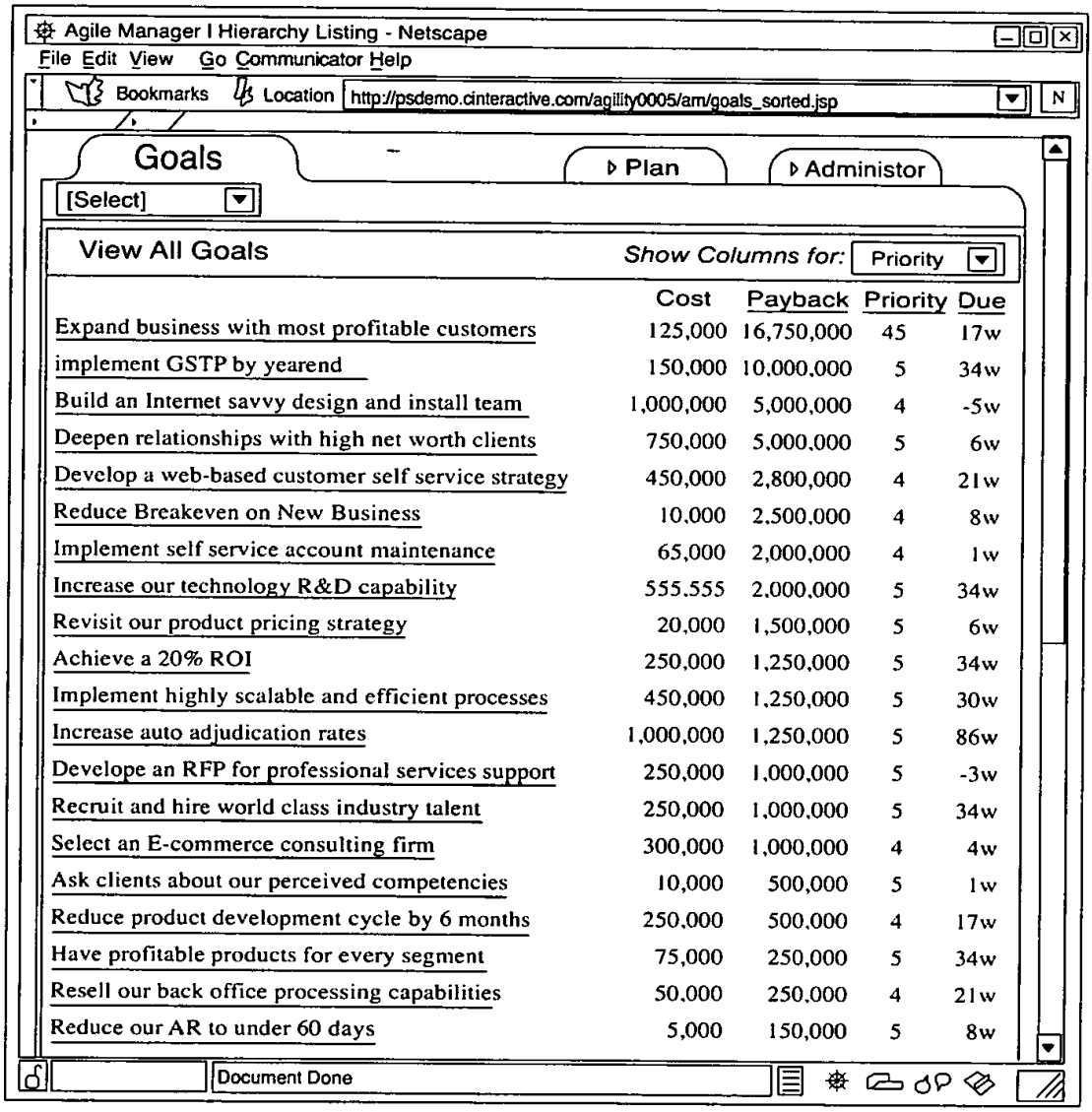

	Cost	Payback	Priority	Due
Expand business with most profitable customers	125,000	16,750,000	45	17w
implement GSTP by yearend	150,000	10,000,000	5	34w
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Reduce Breakeven on New Business	10,000	2,500,000	4	8w
Implement self service account maintenance	65,000	2,000,000	4	1w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Revisit our product pricing strategy	20,000	1,500,000	5	6w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Implement highly scalable and efficient processes	450,000	1,250,000	5	30w
Increase auto adjudication rates	1,000,000	1,250,000	5	86w
Develope an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Ask clients about our perceived competencies	10,000	500,000	5	1w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Have profitable products for every segment	75,000	250,000	5	34w
Resell our back office processing capabilities	50,000	250,000	4	21w
Reduce our AR to under 60 days	5,000	150,000	5	8w

Fig. 19

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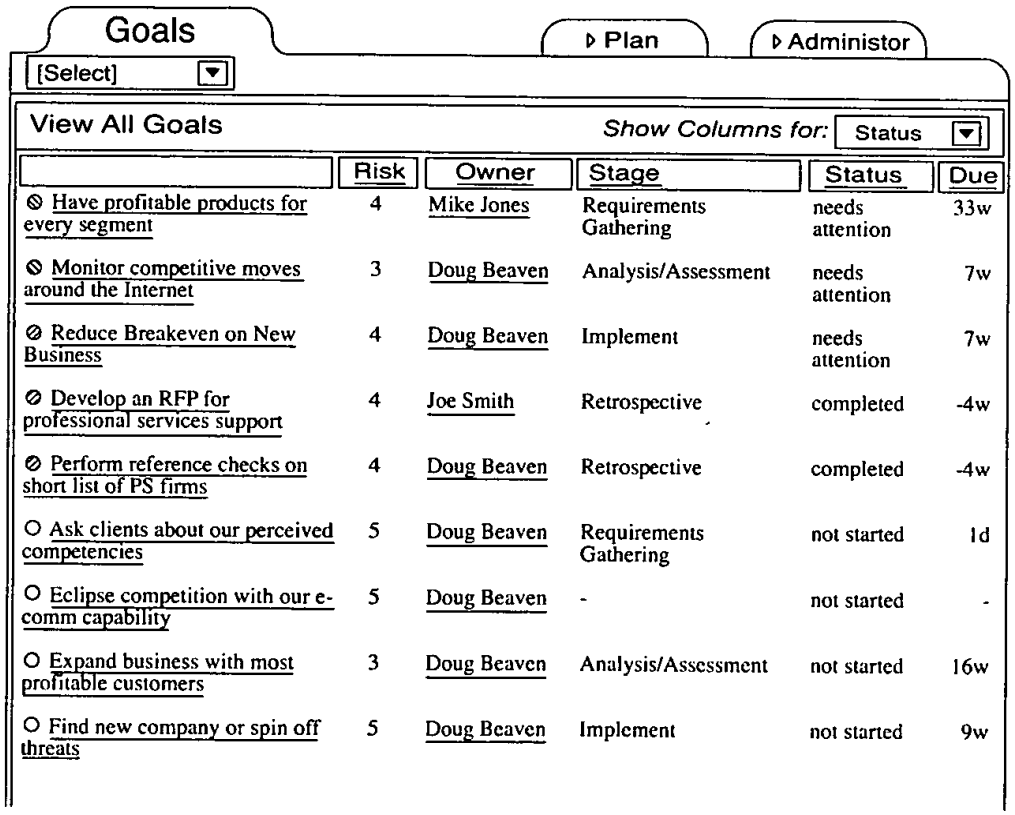

	Risk	Owner	Stage	Status	Due
⊘ Have profitable products for every segment	4	Mike Jones	Requirements Gathering	needs attention	33w
⊘ Monitor competitive moves around the Internet	3	Doug Beaven	Analysis/Assessment	needs attention	7w
⊘ Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w
⊘ Develop an RFP for professional services support	4	Joe Smith	Retrospective	completed	-4w
⊘ Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective	completed	-4w
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d
○ Eclipse competition with our e-comm capability	5	Doug Beaven	-	not started	-
○ Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w
○ Find new company or spin off threats	5	Doug Beaven	Implement	not started	9w

Fig. 20

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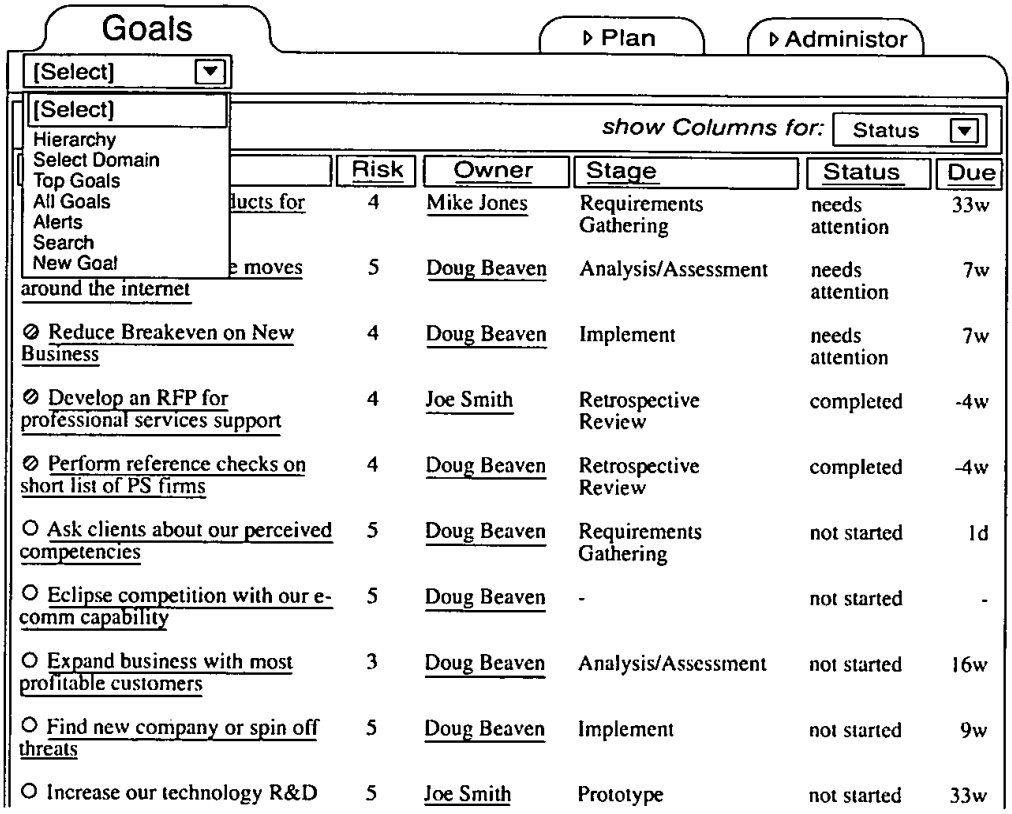

	Risk	Owner	Stage	Status	Due
ducts for	4	Mike Jones	Requirements Gathering	needs attention	33w
e moves around the internet	5	Doug Beaven	Analysis/Assessment	needs attention	7w
⊘ Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w
⊘ Develop an RFP for professional services support	4	Joe Smith	Retrospective Review	completed	-4w
⊘ Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective Review	completed	-4w
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d
○ Eclipse competition with our e-comm capability	5	Doug Beaven	-	not started	-
○ Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w
○ Find new company or spin off threats	5	Doug Beaven	Implement	not started	9w
○ Increase our technology R&D	5	Joe Smith	Prototype	not started	33w

Fig. 21

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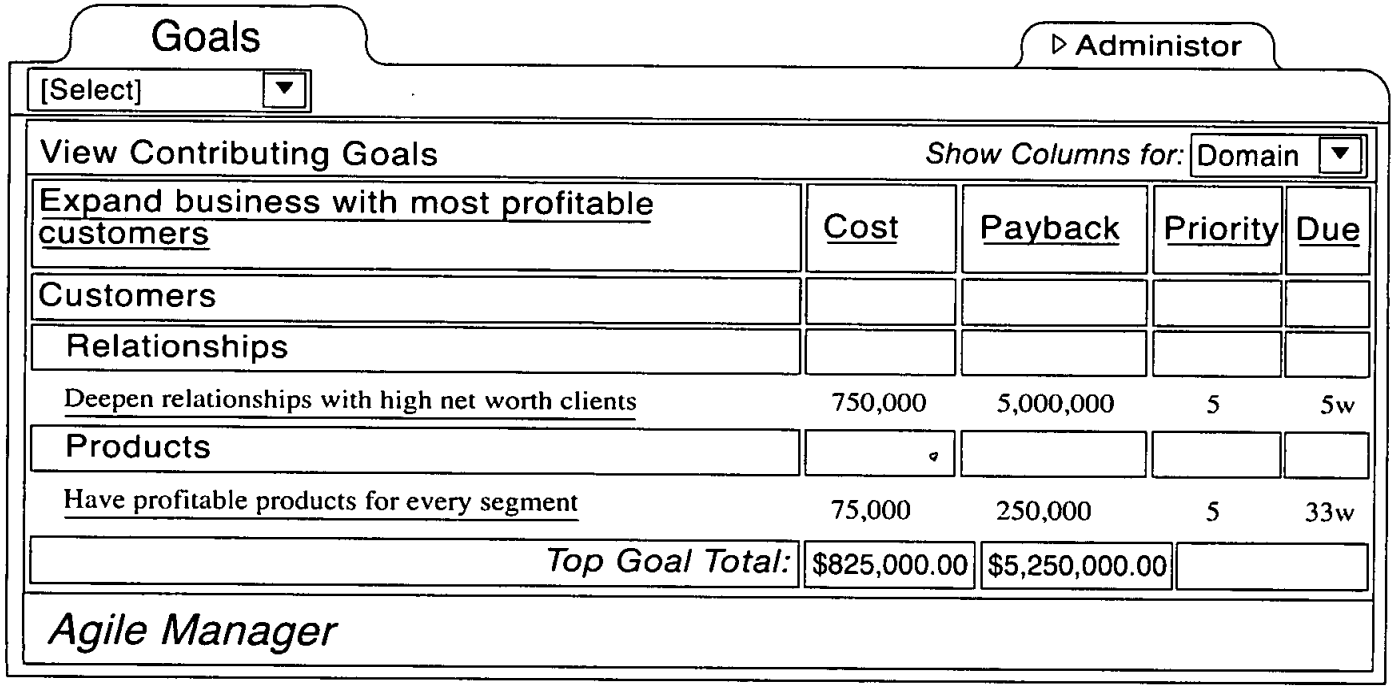

Fig. 22

OIPE JC159 2003 DEMAND
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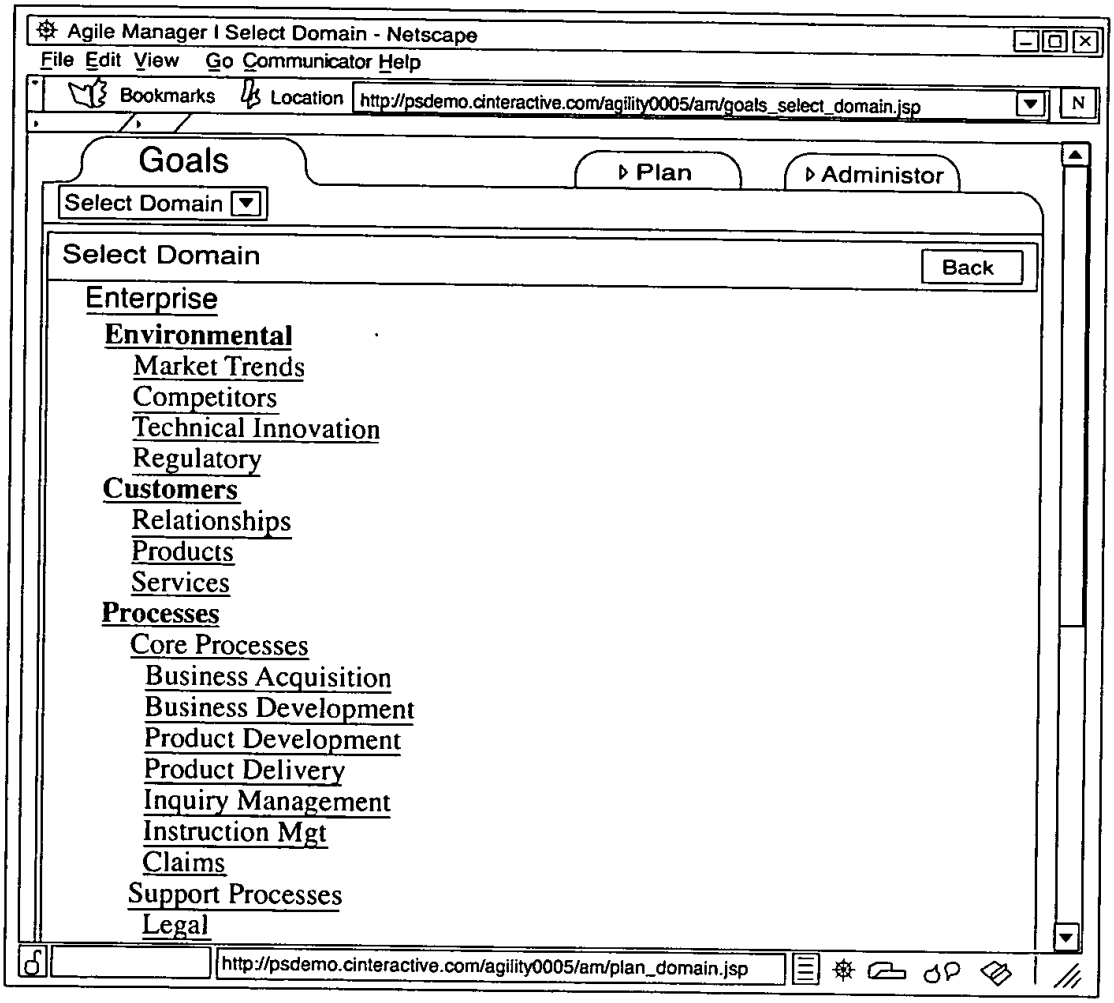

Fig. 23

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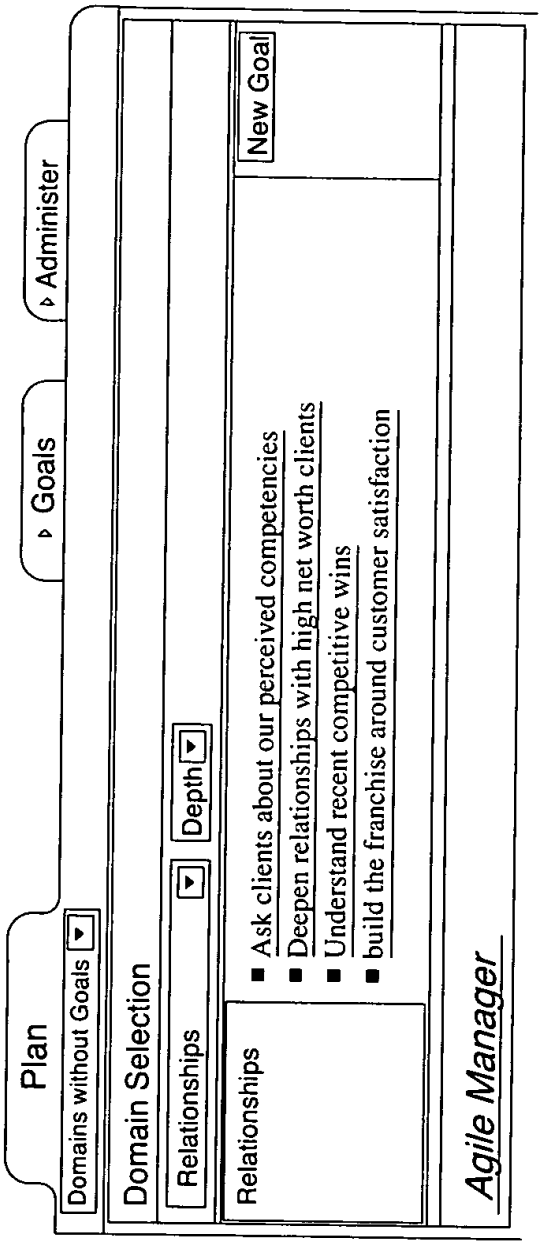

Fig. 24

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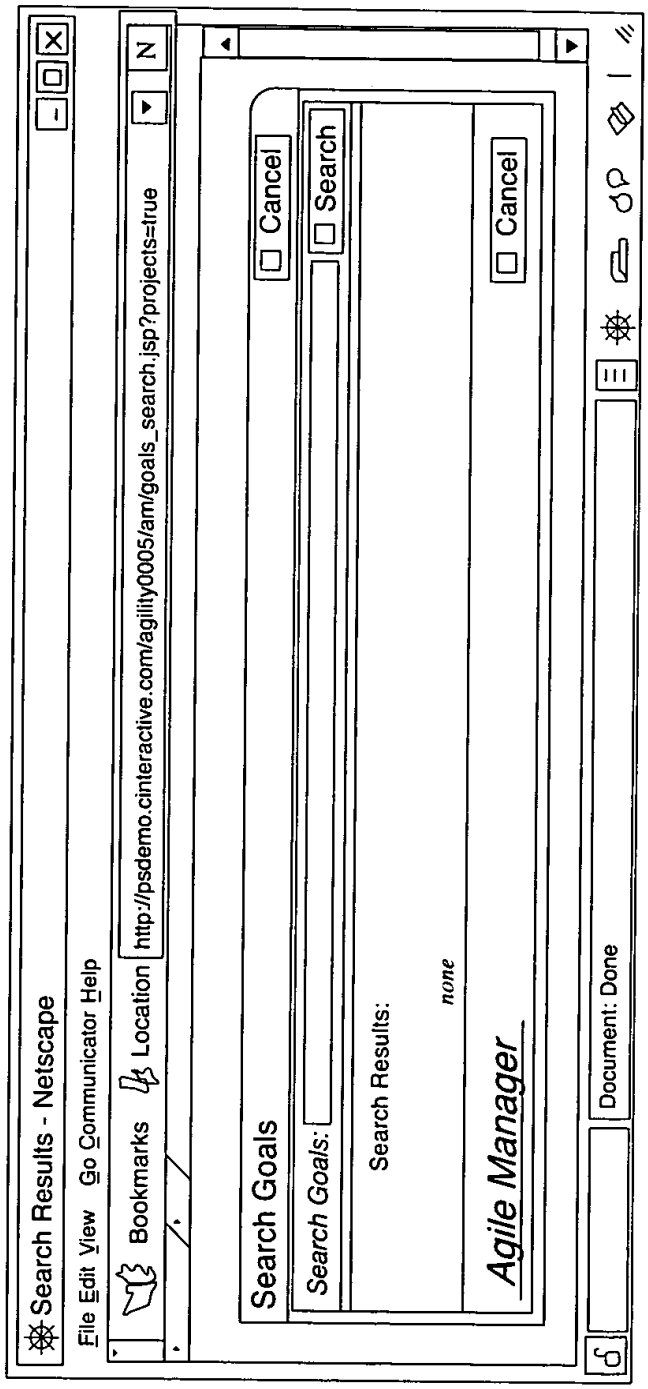

Fig. 25

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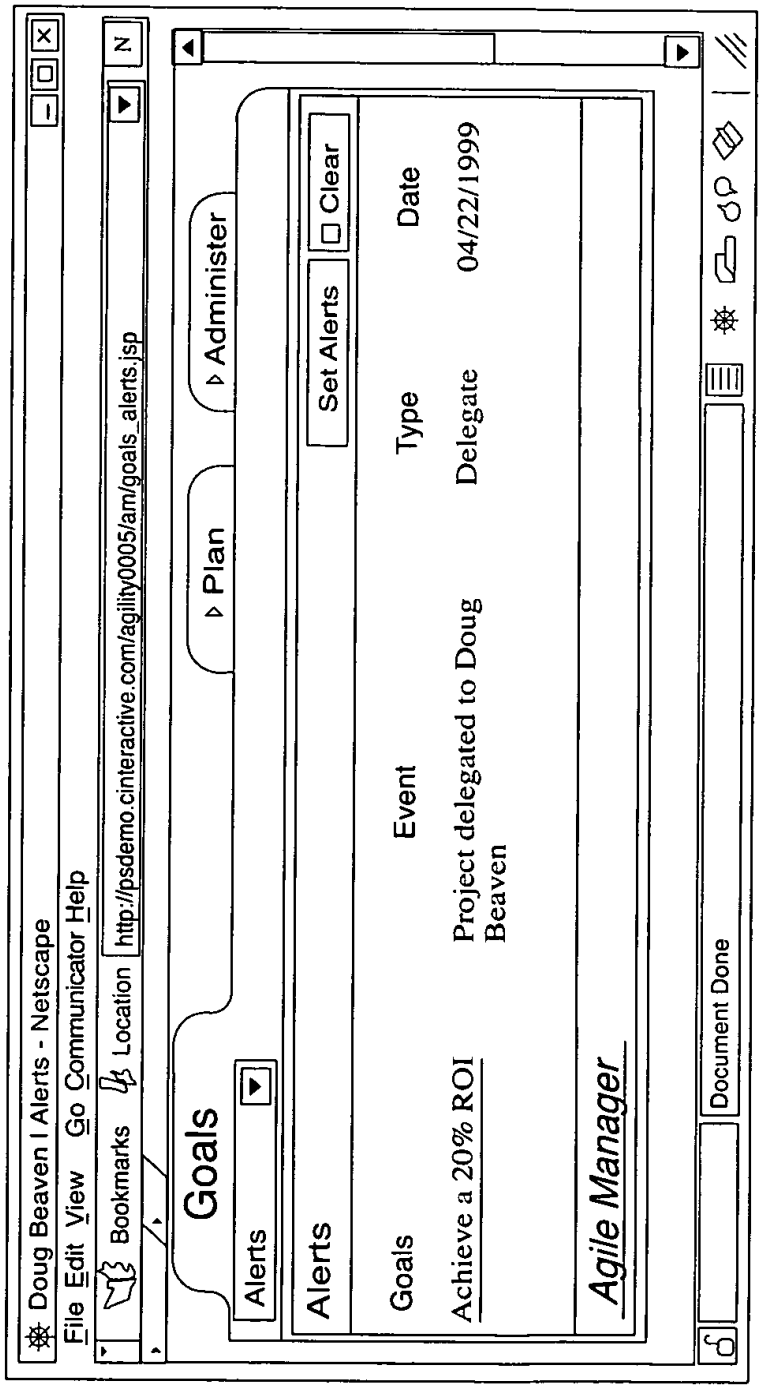

Fig. 26

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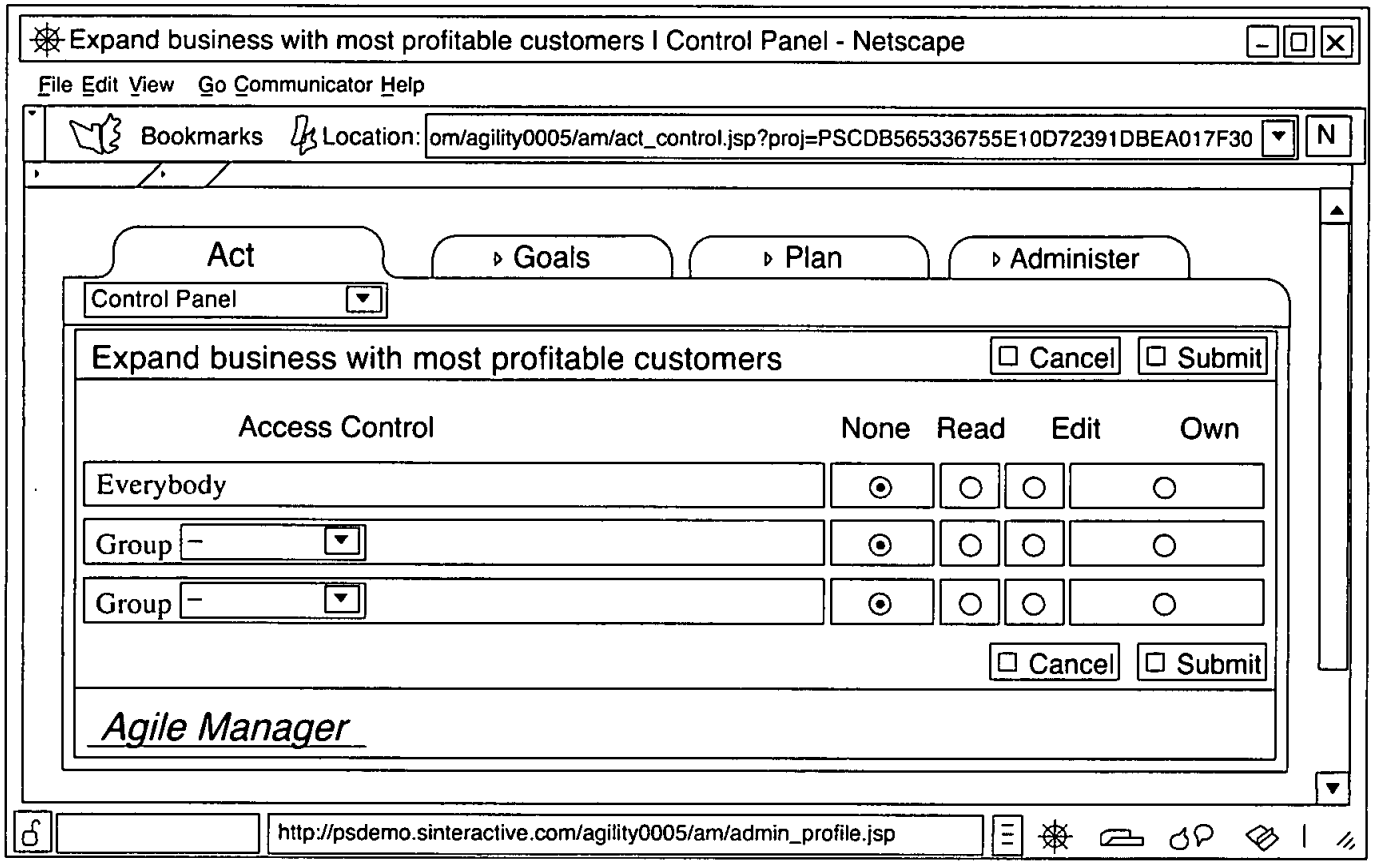

Fig. 27

OIPE 3C109 2003
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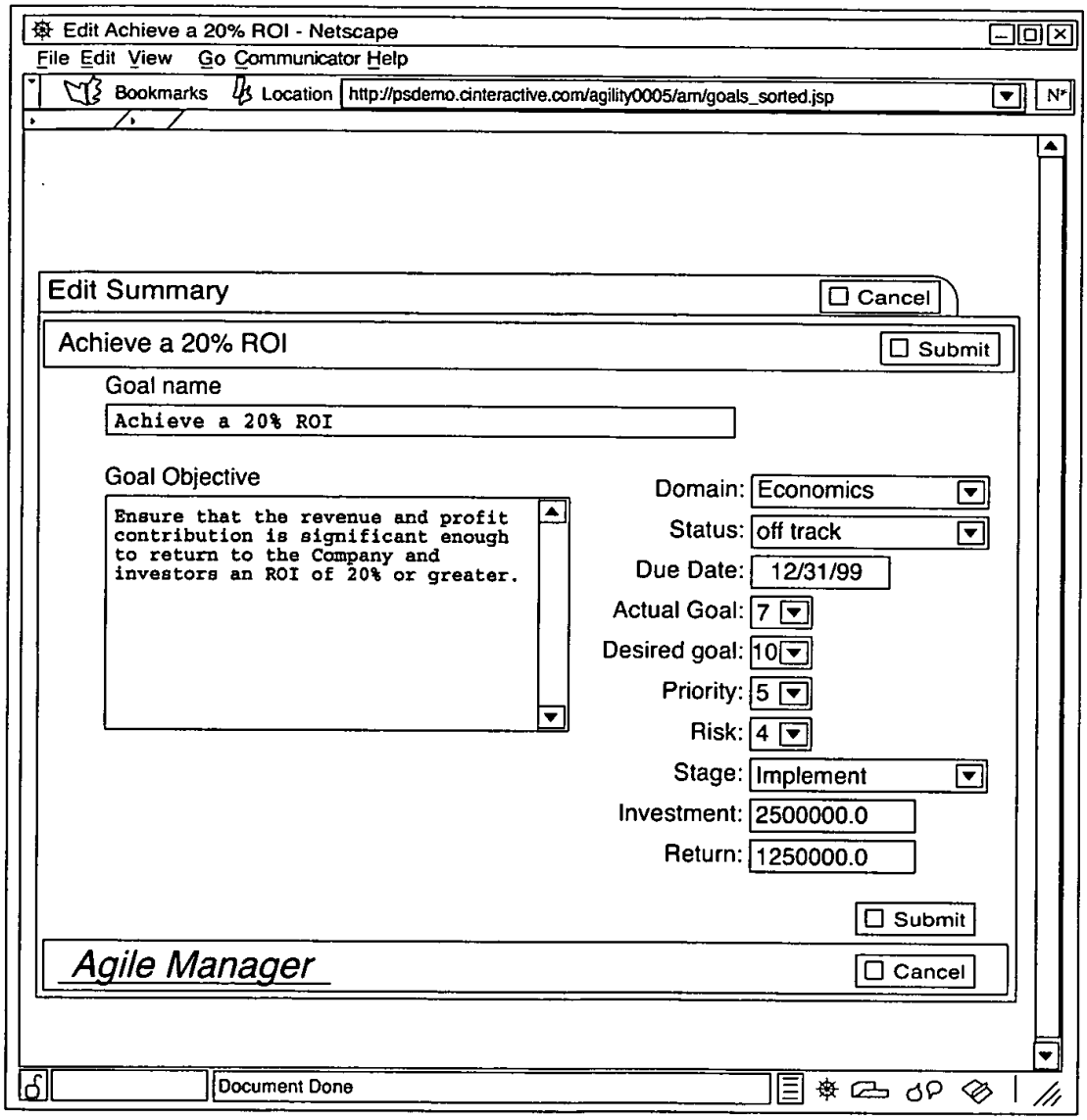

Fig. 28

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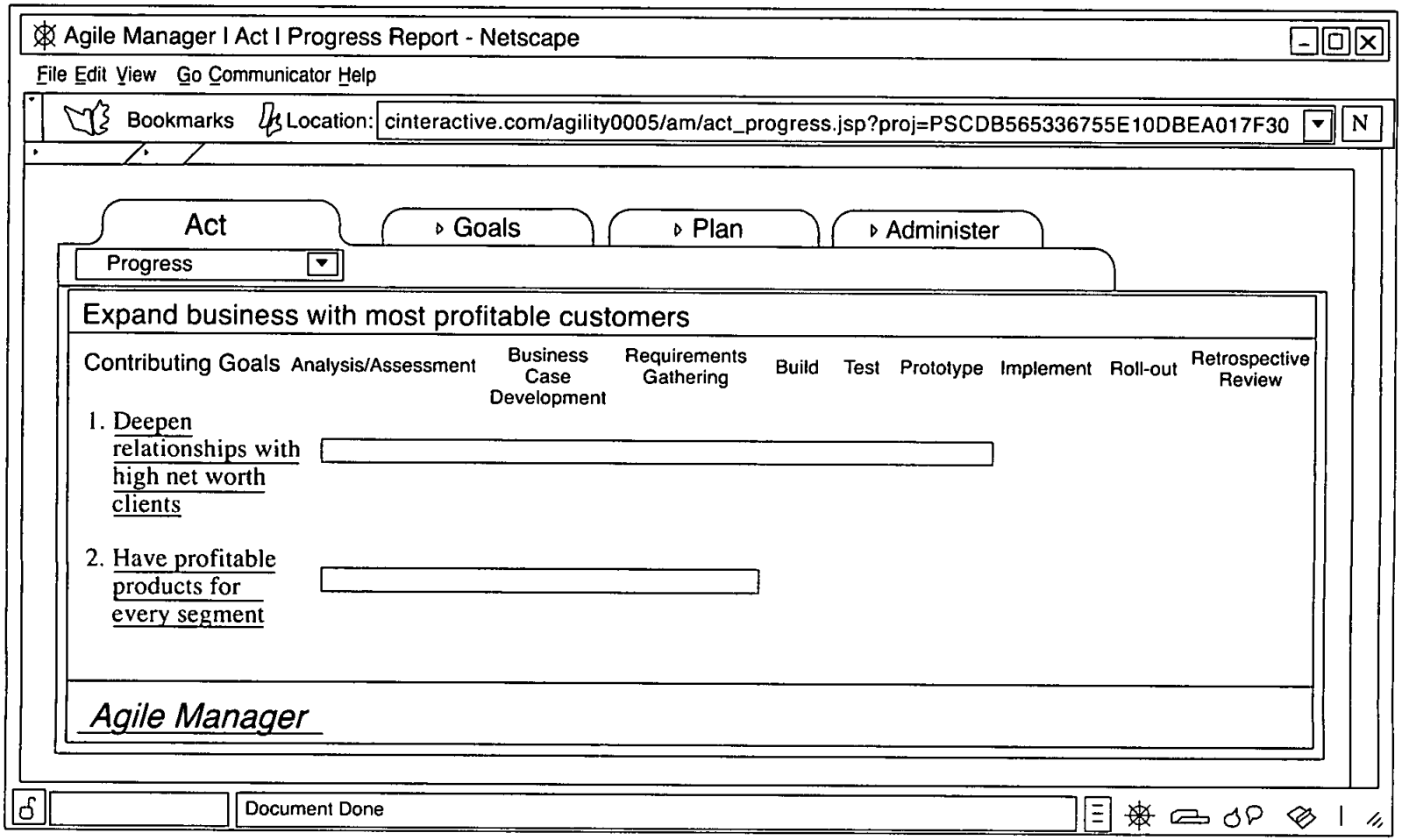

Fig. 29

PATENT & TRADEMARK OFFICE
MAY 05 2003

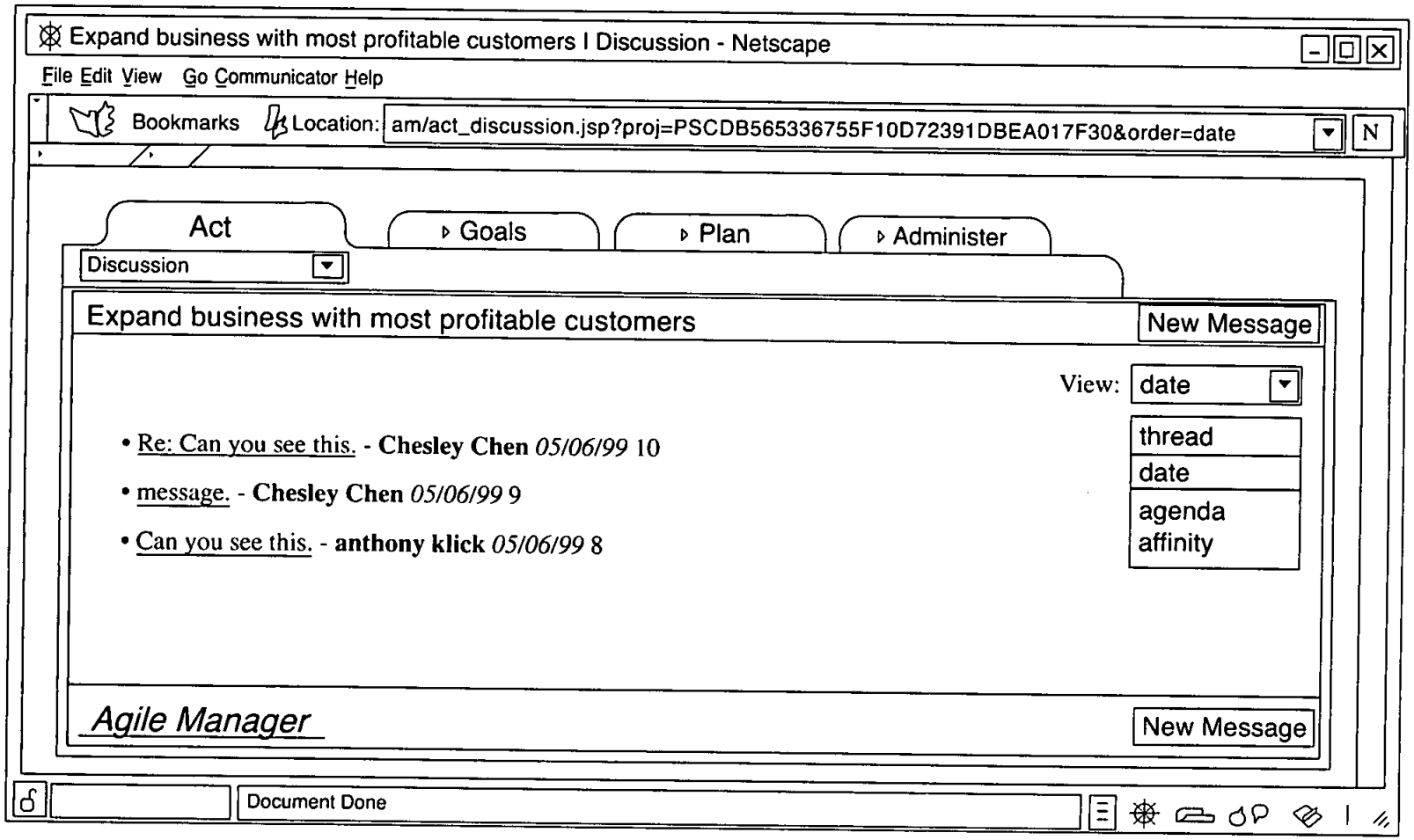

Fig. 30

OIPE 3C109
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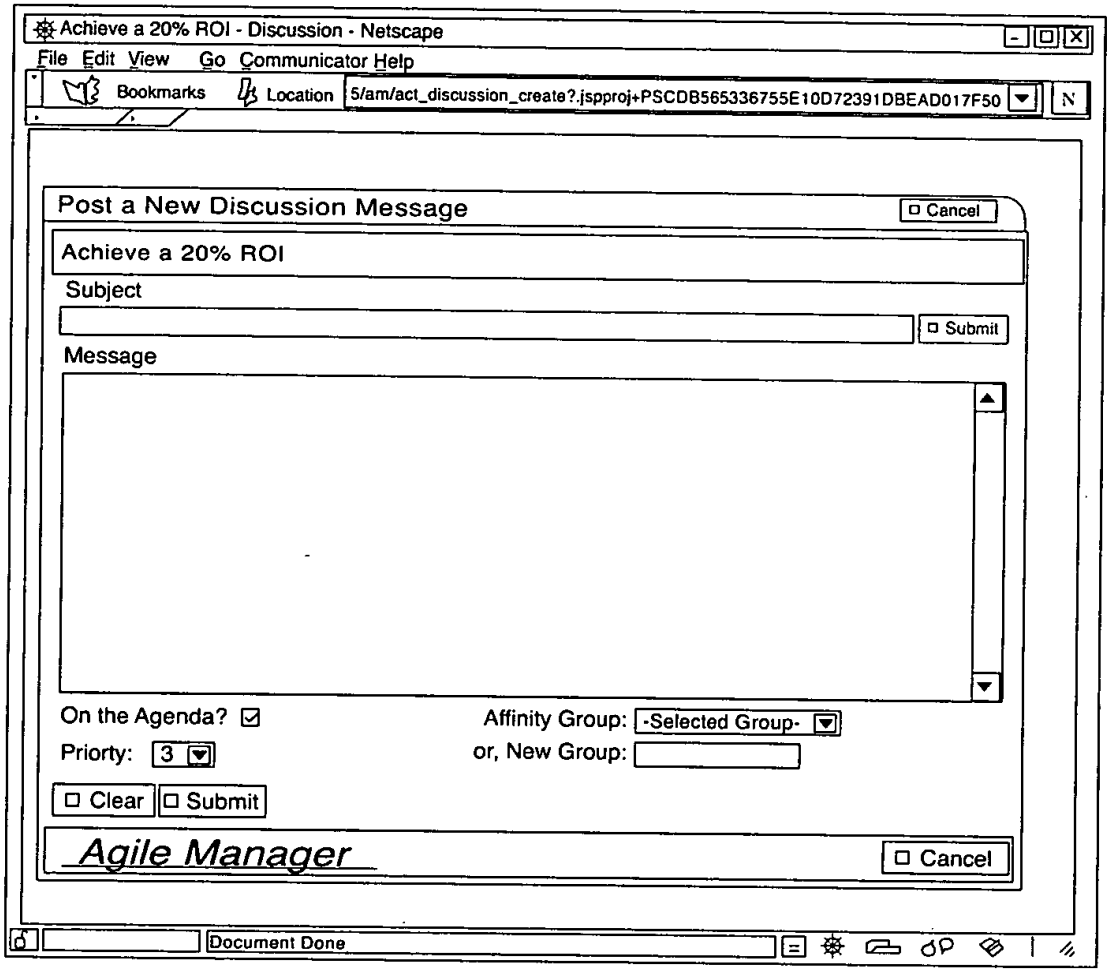

Fig. 31

MAY 05 2003
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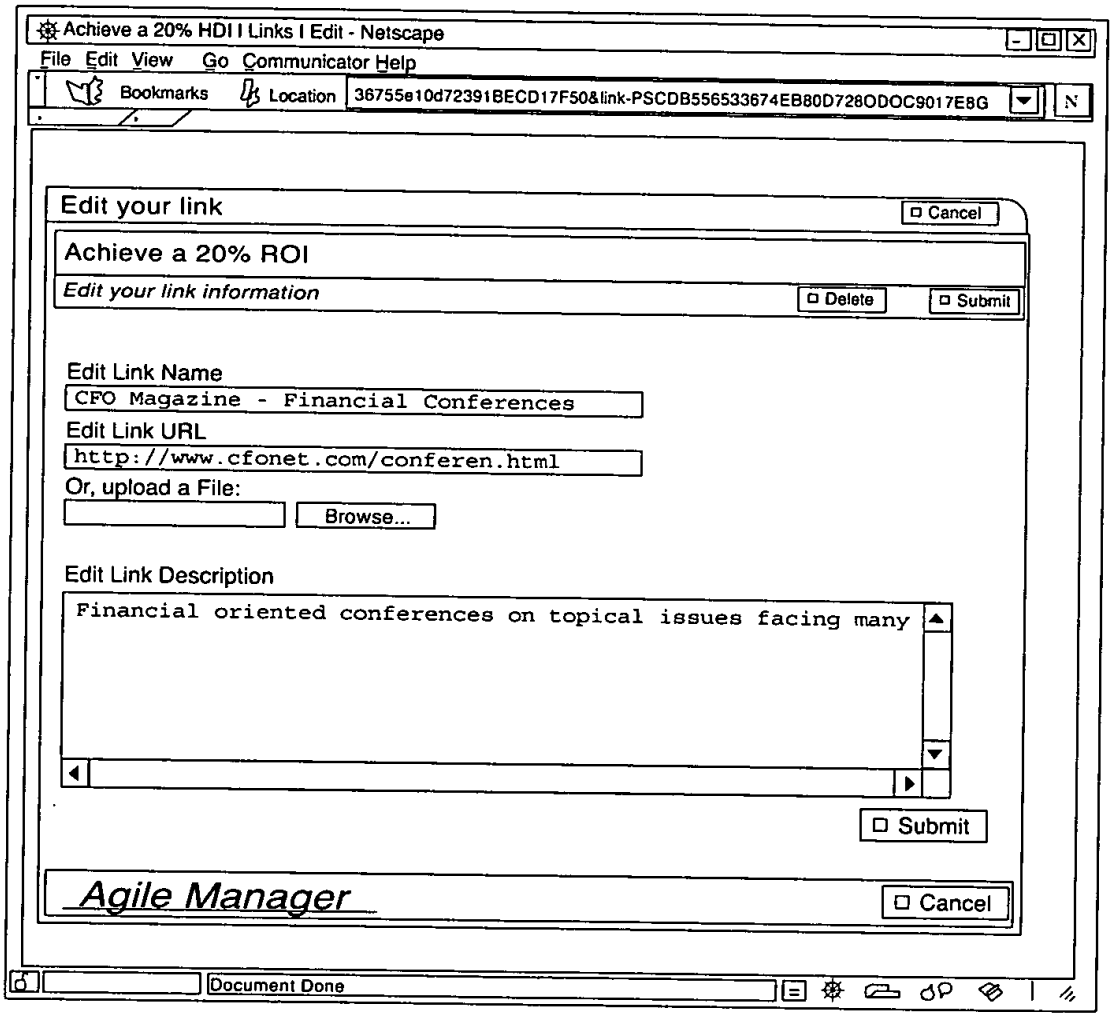

Fig. 32

MAY 0 5 2003

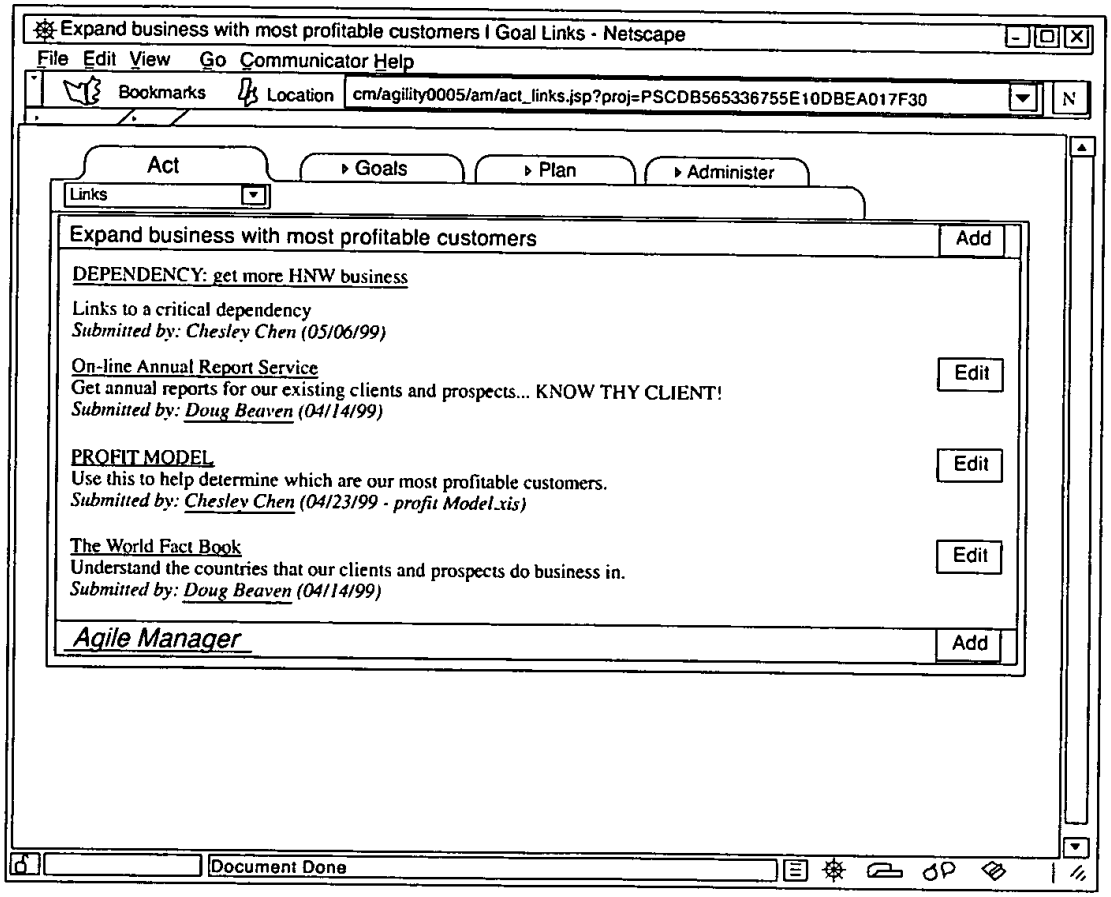

Fig. 33

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Agility
MANAGEMENT PARTNERS

EMPLOYEES ARE TREATED LIKE OWNERS

EMPLOYEES ARE TREATED LIKE AND COMPENSATED IN A MANNER REFLECTIVE OF OWNERSHIP RATHER THAN SERVITUDE.

"Employees [must] trust the company and believe changes are in their best interests." - Donald K. Clifford and Richard E. Cavanagh, *The Winning Performance*

High Performance Traits
Relish change
Fight inertia
Clear strategy
Customer driven
Act like owners
Treated like owners
Reward risk taking
Fact based decisions
Value based decisions
Effective systems
Open to new ideas
Adapt
Process changes
Constant improvement
Fluid boundaries
Teamwork
Anti-bureaucracy
Know business drivers
Make alliances
Focused clearly
Industry trends & challenges
Basic Information
Feedback

	Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree	No Response
1. Managers in this company respect the rights of employees and treat them with dignity and respect.	o	o	o	o	o	o	o	o
2. Job objectives are aligned with the overall corporate vision.	o	o	o	o	o	o	o	o
3. Performance information is shared with employees so they stay focused on results.	o	o	o	o	o	o	o	o
4. Compensation and reward structures are aligned with company and/or unit performace.	o	o	o	o	o	o	o	o

Fig. 34

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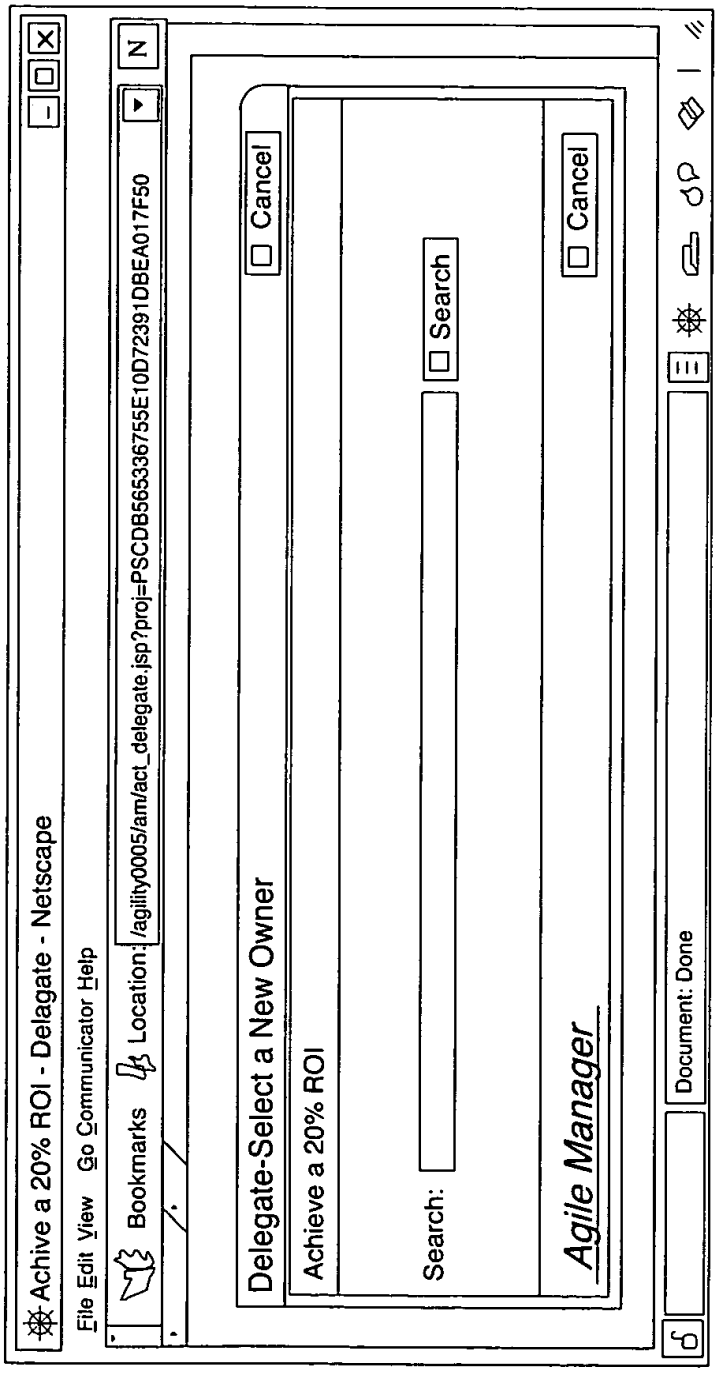

Fig. 34A

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JC16

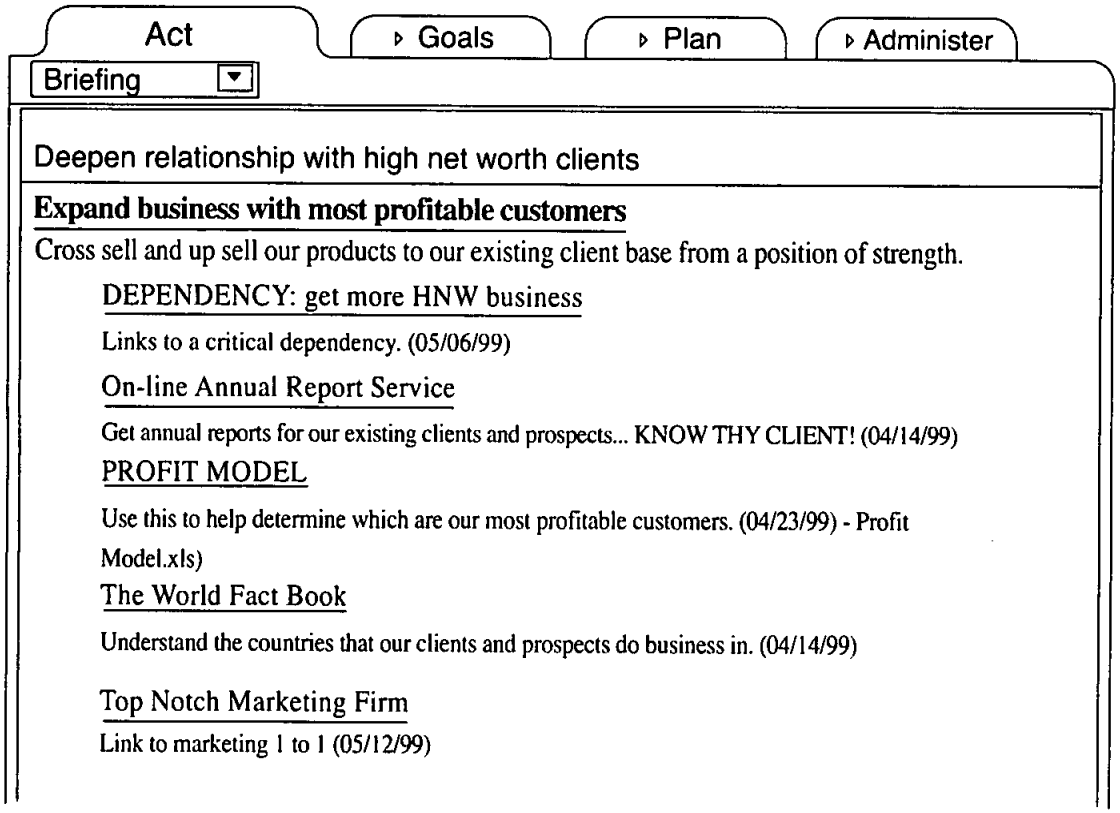

Fig. 35

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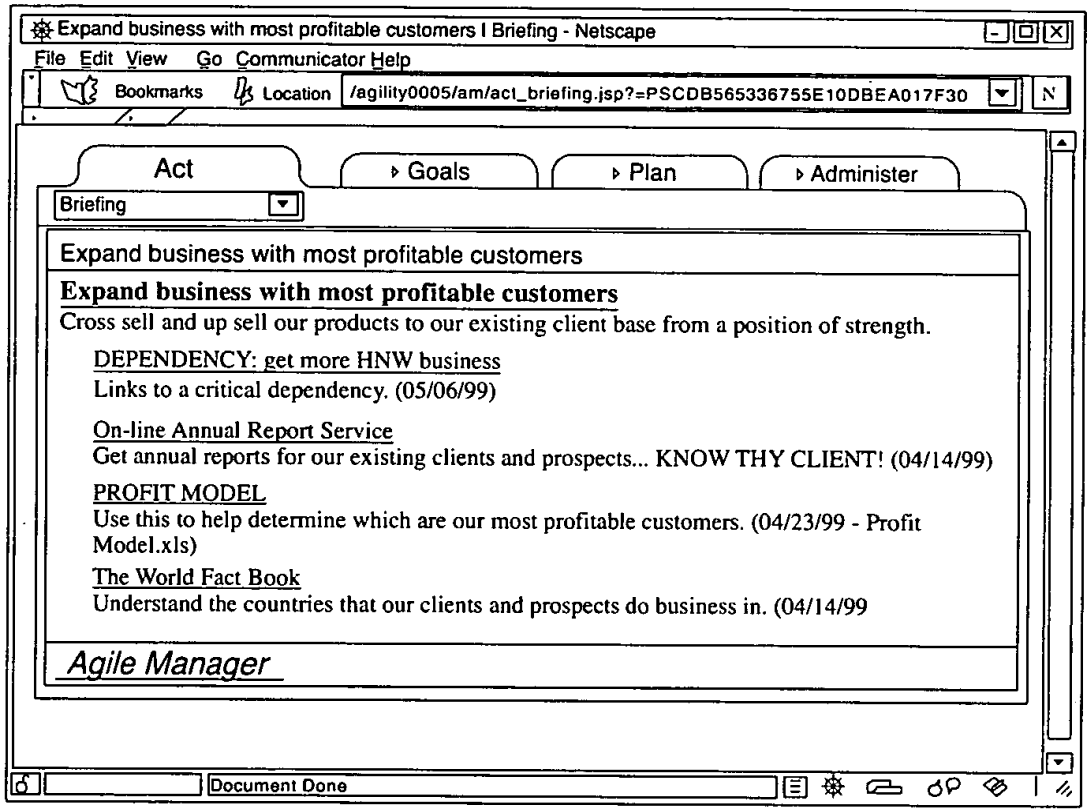

Fig. 36

OIPE
MAY 0 5 2003
JC12
PATENT OFFICE

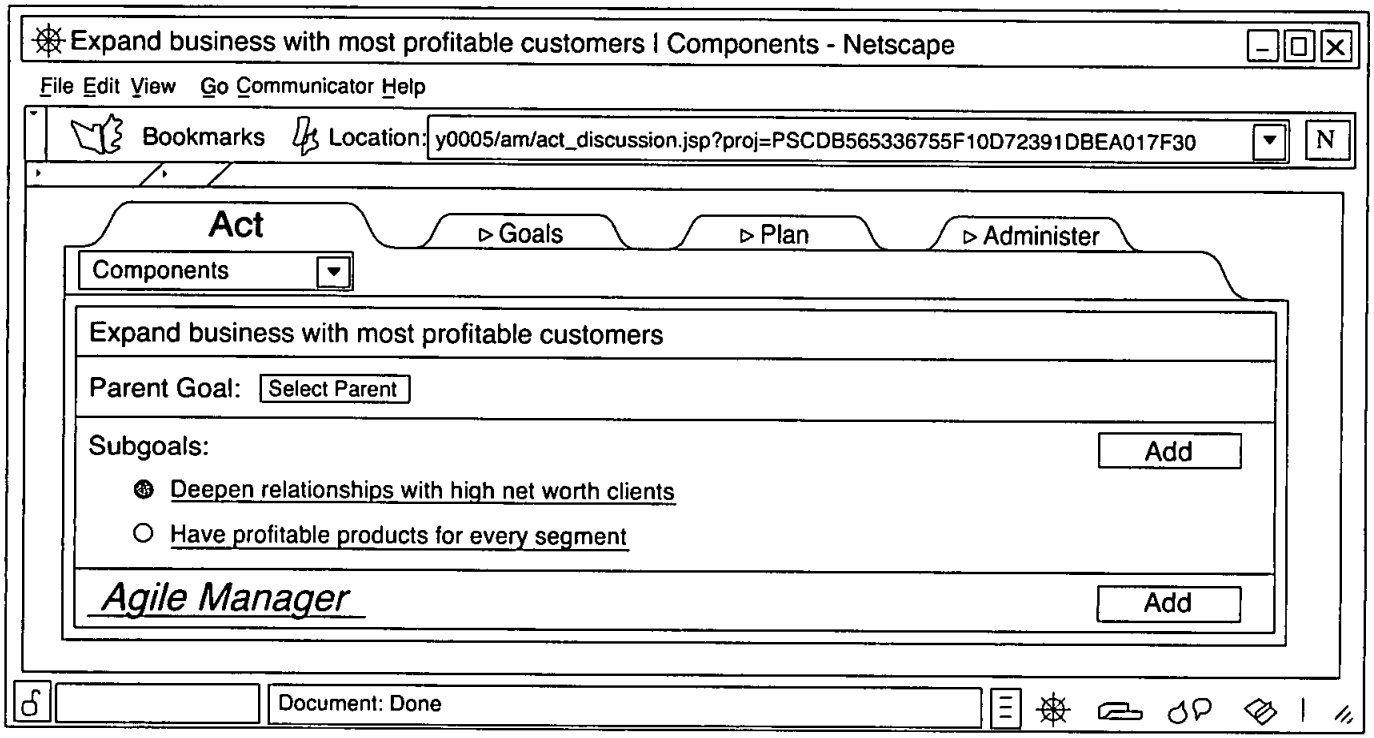

Fig. 37

OIPE JC109
MAY 0 5 2003
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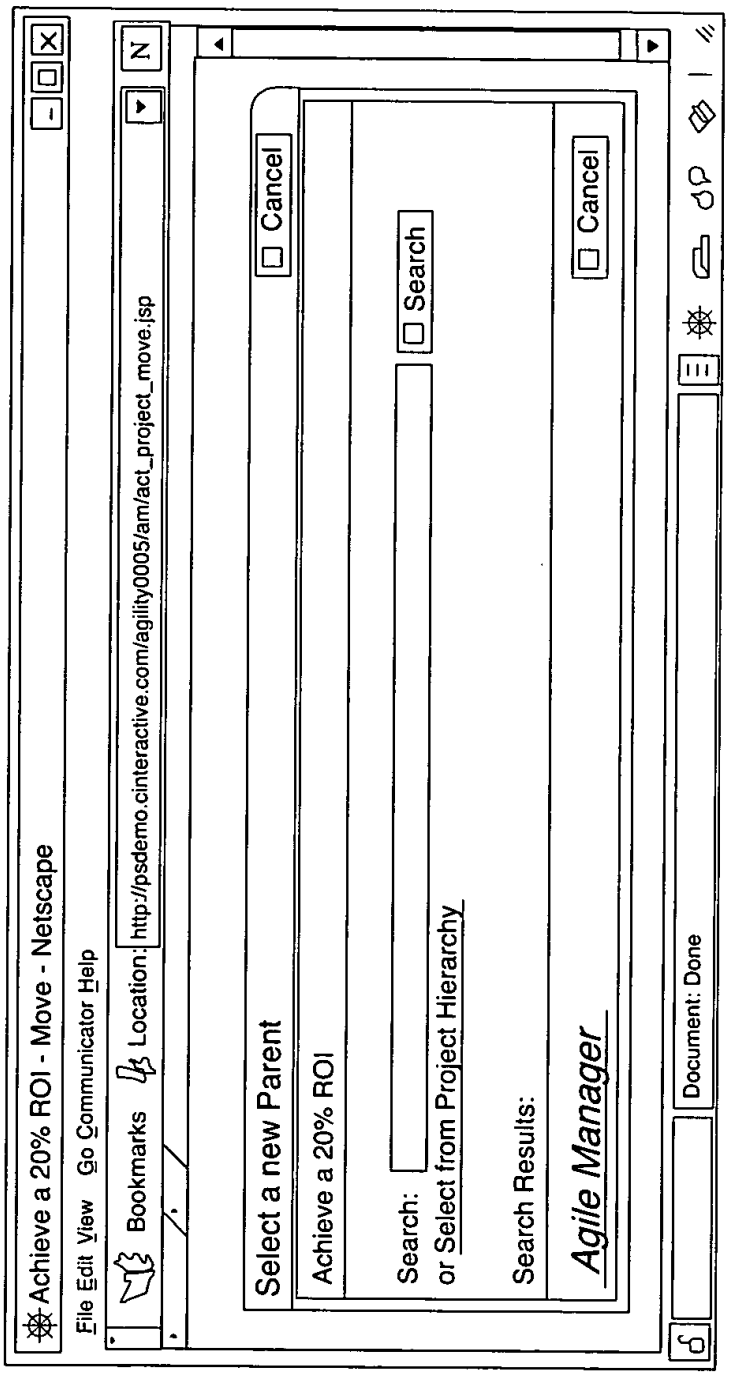

Fig. 38

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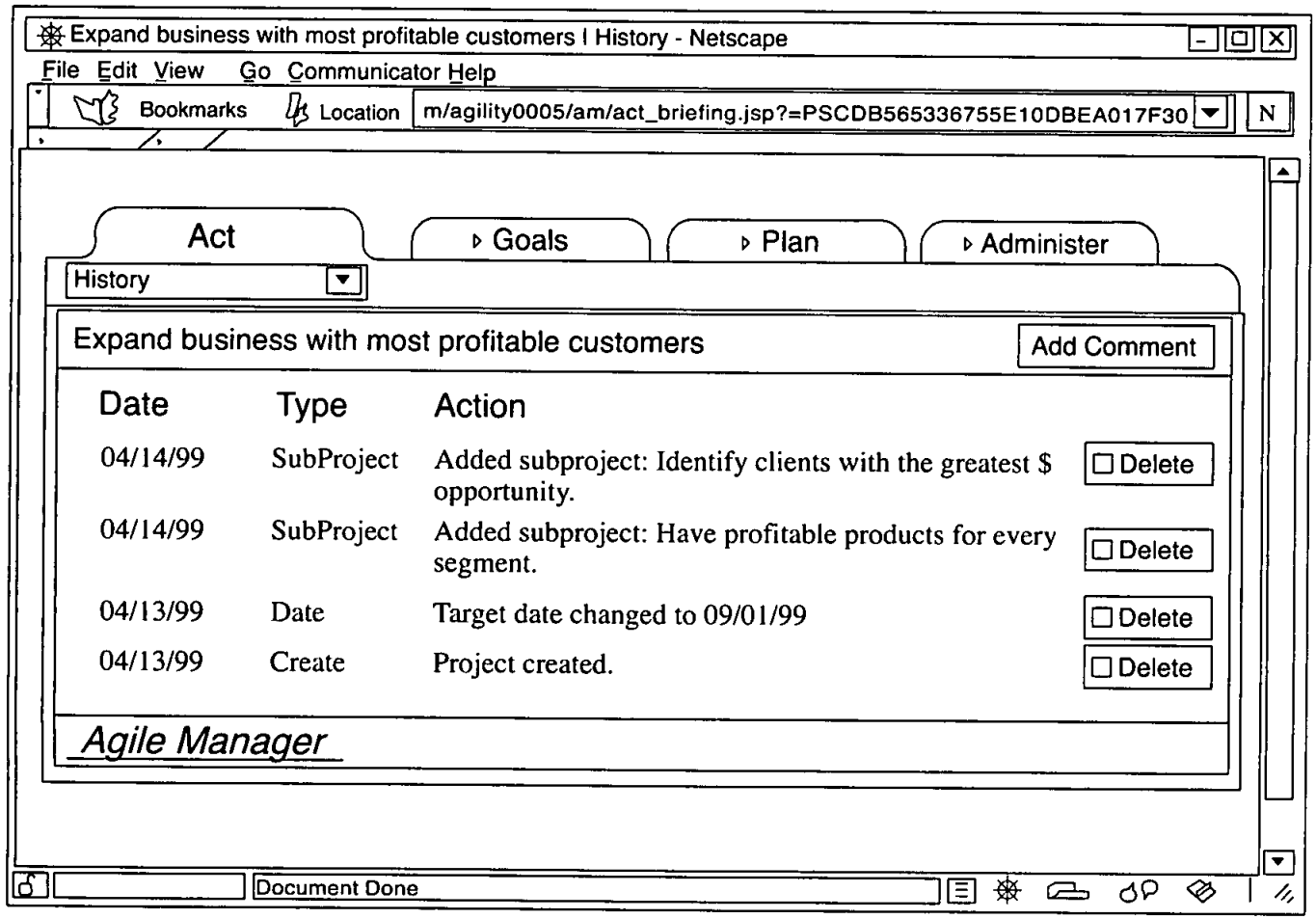

Fig. 39